



# Community Learning Disability Team V1.0

**Document** CareDirector Community Learning Disability Team.  
**Purpose** Community Learning Disability Team daily tasks on CareDirector.  
**Version** V1.0  
**Owner** ICT Business Transformation Team  
**Last Updated** 11/11/2022

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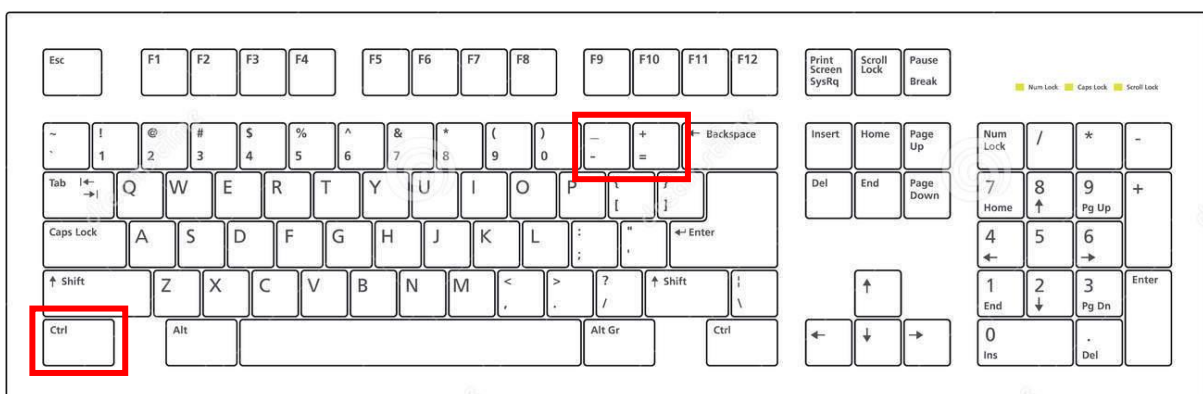
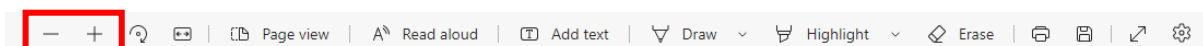
## Guide Information

### Before Live Access...

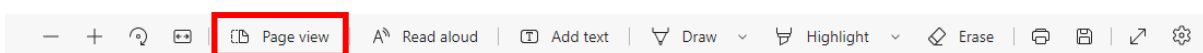
1. Before **CareDirector Live** access can be given, the:
  - a. **E-Learning (GDPR Information Governance)**
  - b. **Code of Conduct**
2. Must be completed.
3. **CareDirector** has a live **Audit Trail** to ensure **GDPR** best practices are adhered to.

### Guide Navigation

1. This guide is in a **PDF** format. Therefore, navigation/ assistance is simple to do.
2. **Zoom In/ Out** if a page requires this, select the - + icons on the toolbar alternatively, **Ctrl (Hold)** and - (**Press**) or **Ctrl (Hold)** and + (**Press**) on your keyboard.

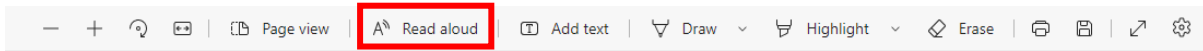


3. To put pages next to one another, select the **Page View** icon on the toolbar.

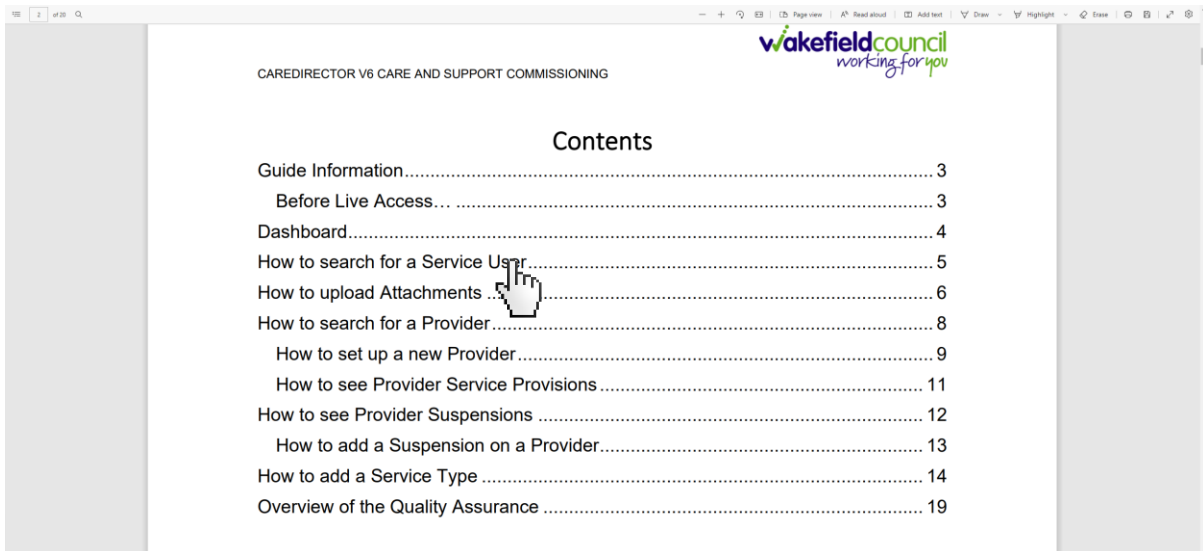




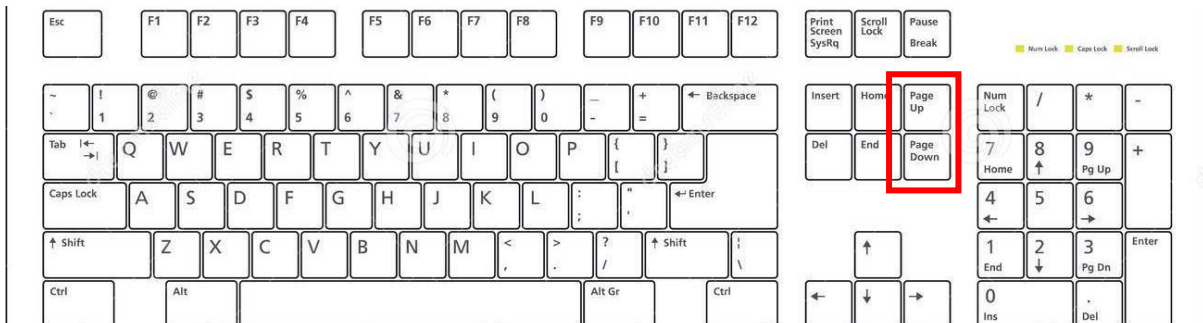
4. For auditory assistance, select **Read Aloud** from the toolbar.



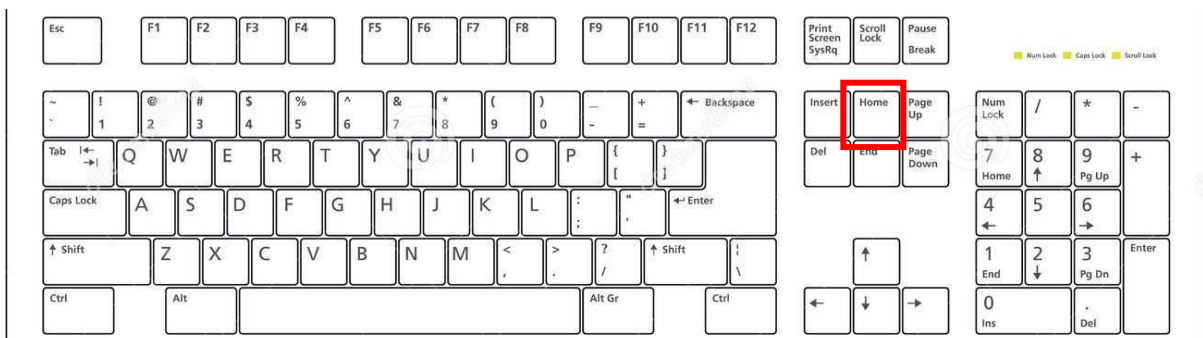
5. From the **Contents** page, select a **Heading** that you want to quickly “jump” to.



6. At any point, use the **Page Up/ PG UP** and **Page Down/ PG DN** buttons on your keyboard to “jump” up and down a page.

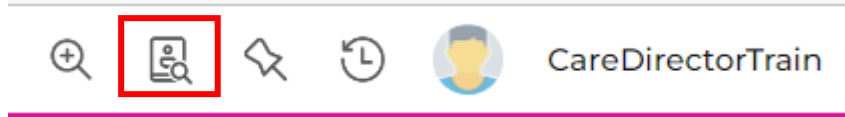


7. At any point, use the **Home** button on your keyboard to “jump” back to the first page.



## How to search for a Service User

1. Select the **Person Search** icon on the **Navigation Menu**



2. Enter their details provided. When finished, select **Search**.

3. Select from the list on the right-hand side. This will open their **Person Record**.

## Updating Person Details

1. Select the **Person Record** that needs updating. Then select the **Edit** function from the toolbar (Pencil Icon).

The screenshot shows the 'Person Record' page for 'Person: TEST Tom'. The toolbar at the top contains several icons, with the pencil icon (representing 'Edit') highlighted by a red box and a red circle with the number '1'. Below the toolbar, the page header shows 'Person Record' and 'Person: TEST Tom'. The main content area displays a timeline of activities:

- OCT 2022**
  - Form (Case) Created** (Yesterday at 15:05): A new record of form (case) was created by Scott Simpson. Details: Due Date, Form Type: AMHP Report Form, Status: In Progress.
  - Service Provision Created** (Yesterday at 10:12): A new record of service provision was created by Scott Simpson. Details: Actual Start Date, Service Provided: Co-ordination Team \ SDS - WMDC Managed Account \ Home Care \ Spot, Status: Draft.
- SEP 2022**
  - Task Created** (28/09/2022 13:58:47): A new record of task was created by Scott Simpson.

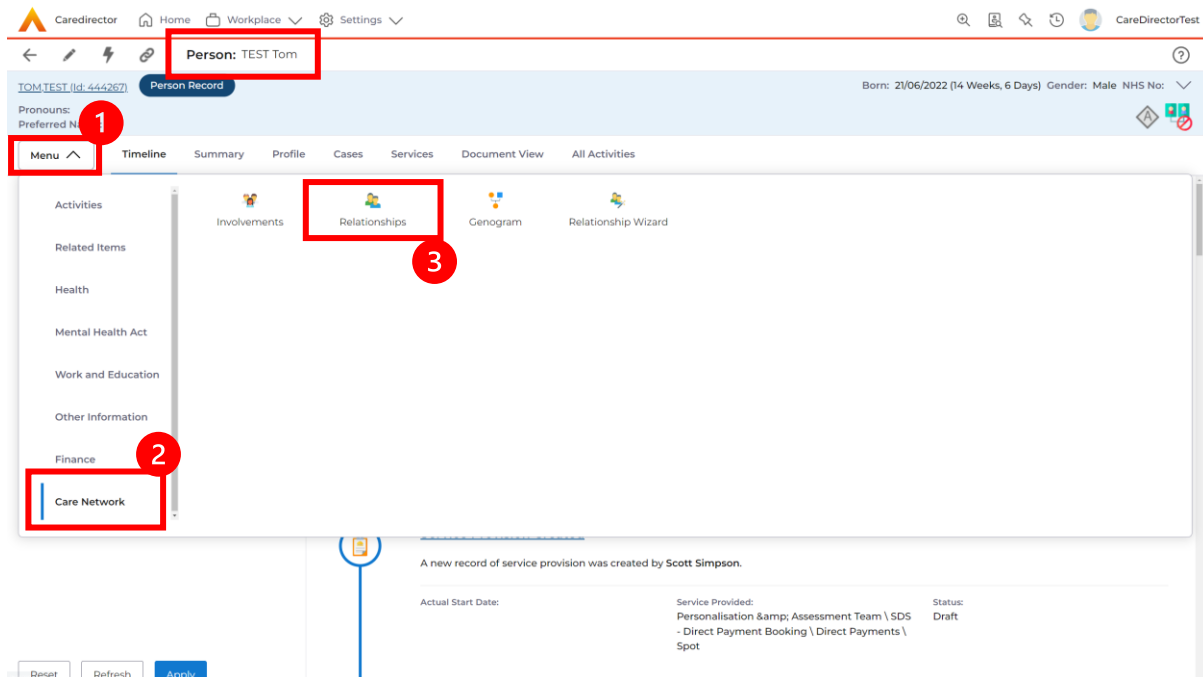
2. This will open the **Person Creation Screen**. Scroll down and edit the details required. When finished, select **Save and Return to Previous Page**.

The screenshot shows the 'Person Creation Screen' for 'Person: TEST Tom'. The toolbar at the top contains several icons, with the 'Save' icon (represented by a floppy disk) highlighted by a red box and a red circle with the number '1'. Below the toolbar, the page header shows 'Person: TEST Tom'. The main content area displays a form for 'Personal Details':

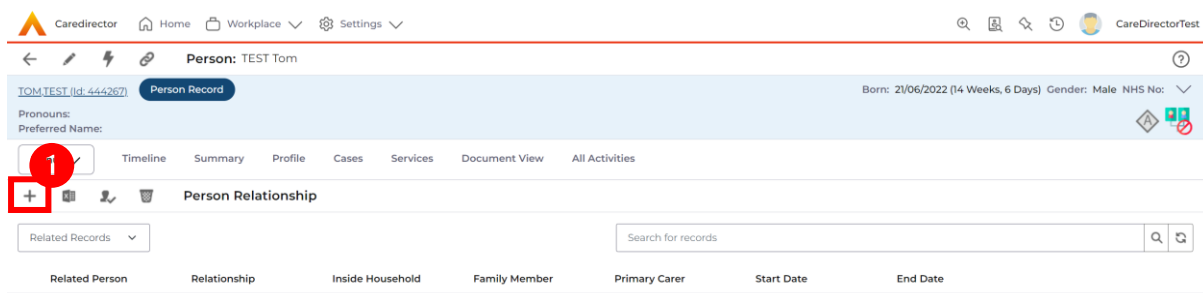
- Id\***: 444267
- Title**: (empty field)
- First Name**: TEST
- Middle Name**: (empty field)
- Last Name\***: Tom
- Stated Gender\***: Male
- Profile Picture**: (empty field with a person icon)
- NHS No.**: (empty field)
- Reason for no NHS No.**: (empty field with search icon)
- Ethnicity\***: White British
- Marital Status**: Divorced

## How to add relationships

1. Locate the **Person Record** and select **Menu**. Inside of **Menu** select **Care Network** then select **Relationships**.



2. When selected, **Create New Record** from the toolbar.



3. Inside this section:
  - a. The **Service User** will be the **Primary Person**.
  - b. **Is a** field, is what the **Primary Person** is to the other **Service User**.
  - c. The **To** field is the other **Service User** already inputted onto the system. (Note: If the **Service User** is not on the system, they need to be created).
  - d. Within **Reciprocal Relationship** section will be the opposite.
  - e. **Nature of Relationship to Primary Person** can be manually inputted.

Caredirector Home Workplace Settings CareDirectorTest

Person Relationship: New

TOM.TEST (id: 444267) **Person Record** Born: 21/06/2022 (14 Weeks, 6 Days) Gender: Male NHS No:   
 Pronouns: Preferred Name:

**Details**

**Relationship to Other Person**

Primary Person\*  
 TEST Tom

is a\*  
 Brother

To\*  
 Tom MullenTest

**Reciprocal Relationship**

Person  
 Tom MullenTest

is a\*  
 Brother

To  
 TEST Tom

**Relationship Details**

Start Date\*  
 03/10/2022

Responsible Team\*  
 CareDirectorTest

End Date

Description

**Nature of Relationship to Primary Person**

Inside Household	Primary Carer
Family Member	Powers of Attorney
Next of Kin	Power of Attorney for Property and Financial Affairs
Emergency Contact	Financial Representative
Key Holder	Young Carer
Advocate	Legal Guardian
MHA Nearest Relative	Secondary Caregiver
Is Birth Parent	Has Parental Responsibility

**4. When finished, select Save and Return to Previous Page.**

## How to Enter Date of Death

1. Locate the **Person Record** and select the **Edit** icon on the toolbar.

The screenshot shows the CareDirector interface for a person record. At the top, there is a navigation bar with 'Caredirector', 'Home', 'Workplace', and 'Settings'. The user is logged in as 'CareDirector'. Below the navigation bar, there is a toolbar with a back arrow, an edit icon (pencil), and a 'Person: Test Tom' label. The 'Edit' icon is highlighted with a red box and a '1' in a red circle. The 'Person: Test Tom' label is also highlighted with a red box. Below the toolbar, there is a header for 'Person Record' with the ID 'TOM.Test (Id: 446229)' and personal details: 'Born: 03/05/1996 (26 Years) Gender: Male NHS No:'. Below the header, there is a menu with options: 'Menu', 'Timeline', 'Summary', 'Profile', 'Cases', 'Services', 'Document View', and 'All Activities'. The 'Timeline' tab is selected. On the left, there is a 'Filter By' section with a dropdown menu, 'From' and 'To' date pickers, and 'Reset', 'Refresh', and 'Apply' buttons. The main content area shows a timeline for 'OCT 2022' with two activities: 'Form (Case) Created' and 'Task Created', both dated 'Yesterday at 11:12' and 'Yesterday at 11:08' respectively. The 'Form (Case) Created' activity includes details: 'A new record of form (case) was created by Scott Simpson.', 'Due Date: 20/11/2022', 'Form Type: DoLS Tracker - Cat 2', and 'Status: In Progress'.

2. Scroll down to **Death Information** and switch the **Deceased** option to **Yes**.

The screenshot shows the CareDirector interface for a person record, scrolled down to the 'Death Information' section. The navigation bar and toolbar are the same as in the previous screenshot. The 'Person: Test Tom' label is visible. Below the header, there is a 'Death Information' section. It includes a 'Deceased' section with two radio buttons: 'Yes' (selected) and 'No'. Below this is a 'Date of Death' field with a calendar icon. To the right, there is a 'Cause of Death' field with a search icon and a 'Place of Death' field.

3. Enter in the details if known, when finished select **Save**. This will send an **activity** to the **Responsible User** and any **Involvements** like a **Secondary Worker**.

## Edit Person Record (Address)

1. Locate the **Person Record**. Once inside, select the **Edit** button on the toolbar (pencil icon).

The screenshot shows the 'Person Record' page for 'TOM TEST (Id: 444267)'. The top navigation bar includes 'CareDirector', 'Home', 'Workplace', and 'Settings'. The toolbar contains a pencil icon (highlighted with a red box and a circled '1'), a lightning bolt icon, and a share icon. The page title is 'Person: TEST Tom'. Below the title, there are tabs for 'Menu', 'Timeline', 'Summary', 'Profile', 'Cases', 'Services', 'Document View', and 'All Activities'. The 'Timeline' tab is active, showing a vertical timeline with three events: 'Service Provision Created' in OCT 2022, 'Task Created' in SEP 2022, and another 'Service Provision Created' in SEP 2022. Each event includes details like 'Actual Start Date', 'Service Provided', 'Responsible Team', 'Responsible User', and 'Subject'.

2. When the **Person** creation screen is open, scroll down to the **Address** section and enter the updated address. Then select **Save and Return to Previous Page**.

The screenshot shows the 'Address' form within the 'Person Record' page. The 'Address' section title is highlighted with a red box. The form contains the following fields:

- Start Date of Address (calendar icon)
- Address Type\* (dropdown menu, currently set to 'Primary')
- Property Name (text input)
- Property No. (text input)
- Street (text input)
- Village/District (text input)
- Town/City (text input)
- County (text input)
- Property Type (text input with search icon)
- UPRN (text input)
- Borough (text input with search icon)
- Ward (text input with search icon)
- Country (text input)
- Accommodation Status (dropdown menu)
- Accommodation Type (text input with search icon)
- Lives Alone (text input)

## How to search for a Case

1. Open the **Person Record** the **Case** is linked too. Then select the **Cases** tab to find the current **Case**.

The screenshot shows the CareDirector interface for a person record. The top navigation bar includes 'Caredirector', 'Home', 'Workplace', and 'Settings'. The user is logged in as 'CareDirectorTest'. The main header shows 'Person: TEST Tom' with a red box and a red circle containing the number '1'. Below this, the person's details are shown: 'TOM.TEST (Id: 444267)', 'Person Record', 'Born: 21/06/2022 (15 Weeks, 0 Day)', 'Gender: Male', and 'NHS No:'. The 'Cases' tab is selected and highlighted with a red box. The timeline shows two events: 'Form (Case) Created' and 'Service Provision Created', both dated 'Yesterday'.

2. When found, select it to open the **Case Record**.

The screenshot shows the CareDirector interface for a person record. The top navigation bar includes 'Caredirector', 'Home', 'Workplace', and 'Settings'. The user is logged in as 'CareDirectorTest'. The main header shows 'Person: TEST Tom' with a red box and a red circle containing the number '1'. Below this, the person's details are shown: 'TOM.TEST (Id: 444267)', 'Person Record', 'Born: 21/06/2022 (14 Weeks, 6 Days)', 'Gender: Male', and 'NHS No:'. The 'Cases' tab is selected and highlighted with a red box. Below the tabs, there is a search bar and a table of related records. The table has columns: 'Responsible Team', 'Responsible User', 'Case Date/Time', 'Contact Reason', 'Case No', 'Presenting Priority', and 'Case Status'. The first three rows of the table are highlighted with a red box and a red circle containing the number '2'.

<input type="checkbox"/>	Responsible Team	Responsible User	Case Date/Time	Contact Reason	Case No	Presenting Priority	Case Status
<input type="checkbox"/>	CareDirector Support		21/06/2022 07:00:00	A - Adult Safeguarding	CAS-000001-0010	Assign To Team	Sc
<input type="checkbox"/>	AMHP Coordinator		20/09/2022 09:20:00	A - AMHP Assessment	CAS-000001-0087	Assign To Team	Sc



## How to create a Case

1. Locate the **Person Record** and under the tab **Cases**, select **Create New Record**.

The screenshot shows the CareDirector interface for a person record. The breadcrumb trail is 'Person: Tom MullenTest'. The 'Cases' tab is selected, and a red box highlights the '+ Create New Record' button. Below the tabs, there is a search bar for records and a table of existing cases.

Responsible Team	Responsible User	Case Date/Time	Contact Reason	Case No	Presenting Priority	Case Status	Create
CareDirectorTest		24/06/2022 08:50:00	A - Assessment of needs	CAS-000001-0019		Assign To Team	TEST C
CareDirectorTest	Catherine Jackson	15/06/2022 08:00:00	A - Adult Safeguarding	CAS-000001-0002		Assign To Team	Scott :

2. Fill out the relevant information to create a new **Case** and when finished select **Save**.

The screenshot shows the 'Case: New' form in the CareDirector interface. The breadcrumb trail is 'Case: New'. The form is titled 'Details' and contains several sections for entering case information.

**Contact Details**

Case No \* [Empty field]

Person \* Tom MullenTest [Search icon]

Case Date/Time \* 07/10/2022 [Calendar icon] 09:00 [Clock icon]

Initial Contact [Search icon]

Date/Time Contact Received \* 06/10/2022 [Calendar icon] 11:00 [Clock icon]

Contact Received By \* Scott Simpson [Search icon]

Contact Reason \* A - Adult Safeguarding [Search icon]

Presenting Priority [Search icon]

Additional Information [Text area]

Referral Reason [Text area]

A red box highlights the 'Save' button in the top left corner of the form.

## How to check the Case Status

1. Whilst on the **Person Record**. Select the **Cases** tab to find the current **Case**.  
When found, select it to open the **Case Record**.

Person: TEST Tom

Person Record

Born: 21/06/2022 (14 Weeks, 6 Days) Gender: Male NHS No: [dropdown]

Menu | Timeline | Summary | Profile | **Cases** | Services | Document View | All Activities

Responsible Team	Responsible User	Case Date/Time	Contact Reason	Case No	Presenting Priority	Case Status	Created
CareDirector Support		21/06/2022 07:00:00	A - Adult Safeguarding	CAS-000001-0010		Assign To Team	Scot
AMHP Coordinator		20/09/2022 09:20:00	A - AMHP Assessment	CAS-000001-0087		Assign To Team	Scot

2. Whilst on the **Case Record**, select the **Details** tab and scroll down to the heading **Assignment Information**. Then view **Case Status** to show if the **Case is Allocated, Closed Under Review, etc.**

Case: Tom, TEST - (21/06/2022) [CAS-000001-0087]

Person Record

Born: 21/06/2022 (14 Weeks, 6 Days) Gender: Male NHS No: [dropdown]

Menu | Timeline | **Details**

**Assignment Information**

Case Status \*  
Assign To Team [x] [Q]

Case Priority [input] [Q]

Responsible User [input] [Q]

Responsible Team \*  
AMHP Coordinator [Q]

Review Date [calendar icon]

Last Assigned to Team Date  
20/09/2022 [calendar icon]

## How to change the Case Status

1. On the **Case Status** field select the **Lookup** function and select the relevant **Case Status**.

Case: Tom, TEST - (21/06/2022) [CAS-000001-0087]

Person Record

Born: 21/06/2022 (14 Weeks, 6 Days) Gender: Male NHS No: [redacted]

Menu ▾ Timeline **Details**

**Assignment Information**

Case Status\* Assign To Team 🔍

Case Priority

Responsible User

Responsible Team\* AMHP Coordinator

Review Date

Last Assigned to Team Date 20/09/2022

2. Choose the relevant option and select **OK** when found. Select **Save**.

Case Statuses Enter your search criteria.

Look in Social Care Case Status Lookup View

Search

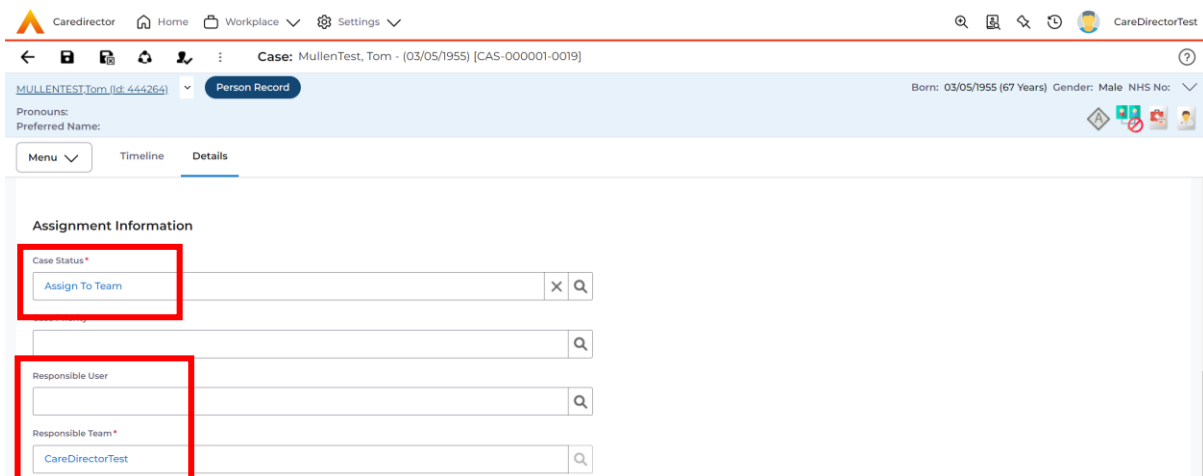
<input type="checkbox"/>	Name	Code	Gov C
<input checked="" type="checkbox"/>	Allocated	200013	
<input type="checkbox"/>	Assign To Team	200014	
<input type="checkbox"/>	Assigned to Team (unscheduled revie...		
<input type="checkbox"/>	Awaiting Allocation	200012	
<input type="checkbox"/>	Awaiting allocation (unscheduled revi...		

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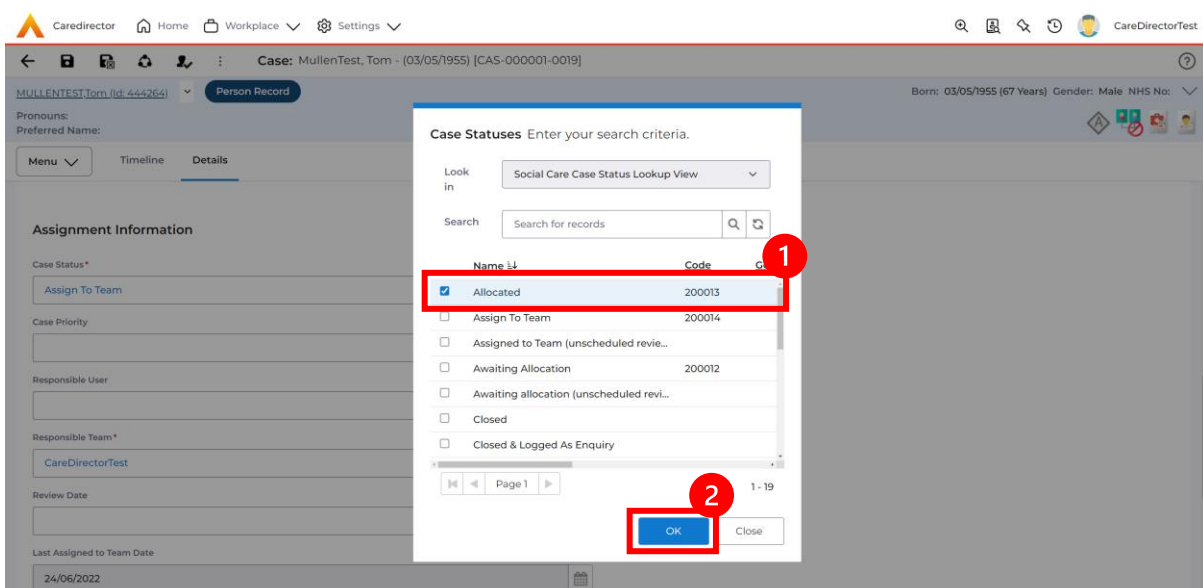
OK Close

## How to Allocate a Case to a Worker

1. A team will receive a **Case** with the **Case Status** as **Assign to Team** or **Awaiting Allocation** depending on **Case Route**.
2. **Responsible User** field will be blank, but the **Responsible Team** will be filled in.



3. The **Case Manager** or **Team Manager** will then **Allocate** the **Case** to the **Responsible User**. This will remove it from the **Teams Dashboard** and put it on the **Responsible Users dashboard**.
4. First select the **Lookup** function on the **Case Status** field and select **Allocate**. Then select **OK**.



- After, the **Responsible User** field will be mandatory. Use the **Lookup** function and select the **Responsible User** for this **Case**. When selected, select **OK**.

Responsible User\*

🔍

---

**System Users** Enter your search criteria. 1

Look in: My Business Unit Users

Search: System Views

CareLiveFD Wakefield CareDirectorTest  
 CareLiveInstall CareWo... CareDirectorTest  
 CareLiveInternal Wak... CareDirectorTest 2  
 CareLiveMigration Wa... CareDirectorTest  
 CareLivePlugin Wakefie... CareDirectorTest  
 CareLivePowerusr Wak... CareDirectorTest  
 CareTestIFD Account CareDirectorTest

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3 OK Close

- When a **Responsible User** has been chosen, select **Save** from the toolbar. This will send the **Case** to their **Dashboard** and **System Views**.

**Assignment Information**

Case Status\* Allocated x 🔍

Case Priority  🔍

Responsible User\* Scott Simpson x 🔍

Responsible Team\* CareDirectorTest 🔍

Review Date  📅

---

1 Save

## How to send a Case to another team

1. There may be reasons that a **Case** needs to be sent to another team.
2. Locate the **Case** that requires assigning to another team, if this **Case** has a **Responsible User**, then it will have the **Case Status** of **Allocated**.
3. First, change the **Case Status** to **Assign to Team** using the **lookup** function and select **Save**.

Caredirector Home Workplace Settings Case: MullenTest, Tom - (03/05/1995) [CAS-000001-0011]

MULLENTEST, Tom (Id: 446230) Person Record Born: 03/05/1995 (27 Years) Gender: Male NHS No:   
 Pronouns: Preferred Name:

Menu Timeline Details

**Assignment Information**

Case Status \*  
Assign To Team [X] [Q]

Case Priority [Q]

Responsible User  
Scott Simpson [X] [Q]

Responsible Team \*  
CareDirector [Q]

Review Date [Calendar Icon]

4. The **Responsible User workflow** will be triggered therefore leaving the field blank. Even though, the **Responsible User** has been removed it will leave the **Responsible Team** the same. Select **Assign this record to another team** from the toolbar.

Caredirector Home Workplace Settings Case: MullenTest, Tom - (03/05/1995) [CAS-000001-0011]

MULLENTEST, Tom (Id: 446230) Person Record Born: 03/05/1995 (27 Years) Gender: Male NHS No:   
 Pronouns: Preferred Name:

Menu Timeline Details

**Assignment Information**

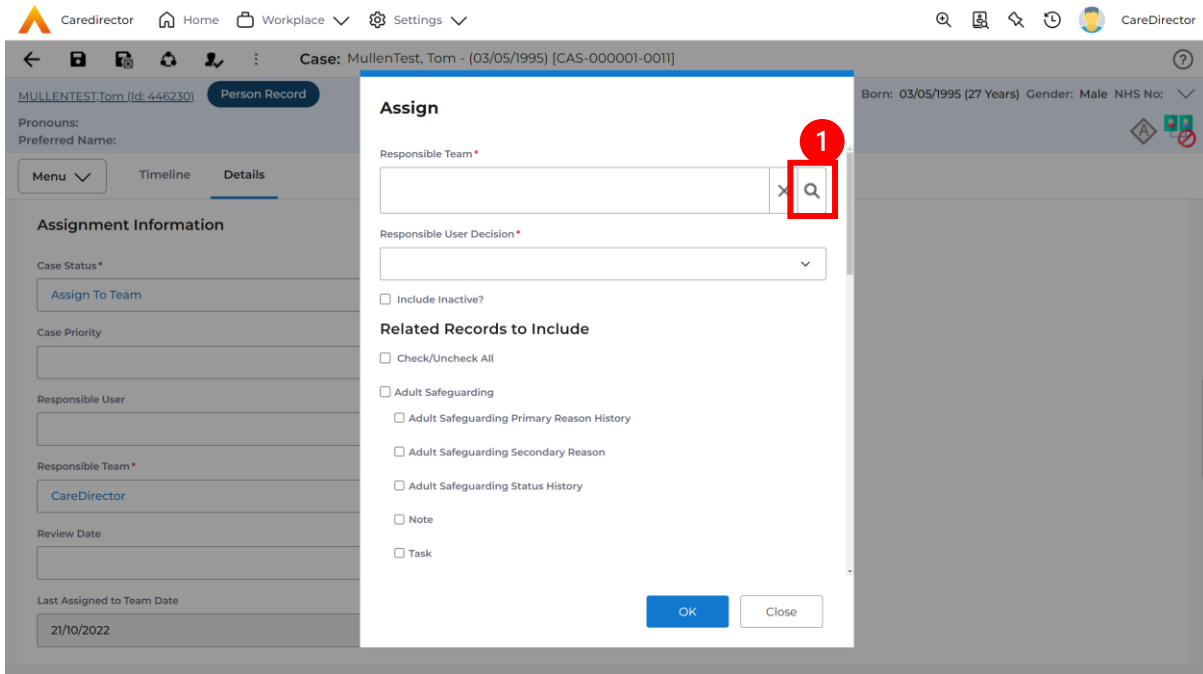
Case Status \*  
Assign To Team [X] [Q]

Case Priority [Q]

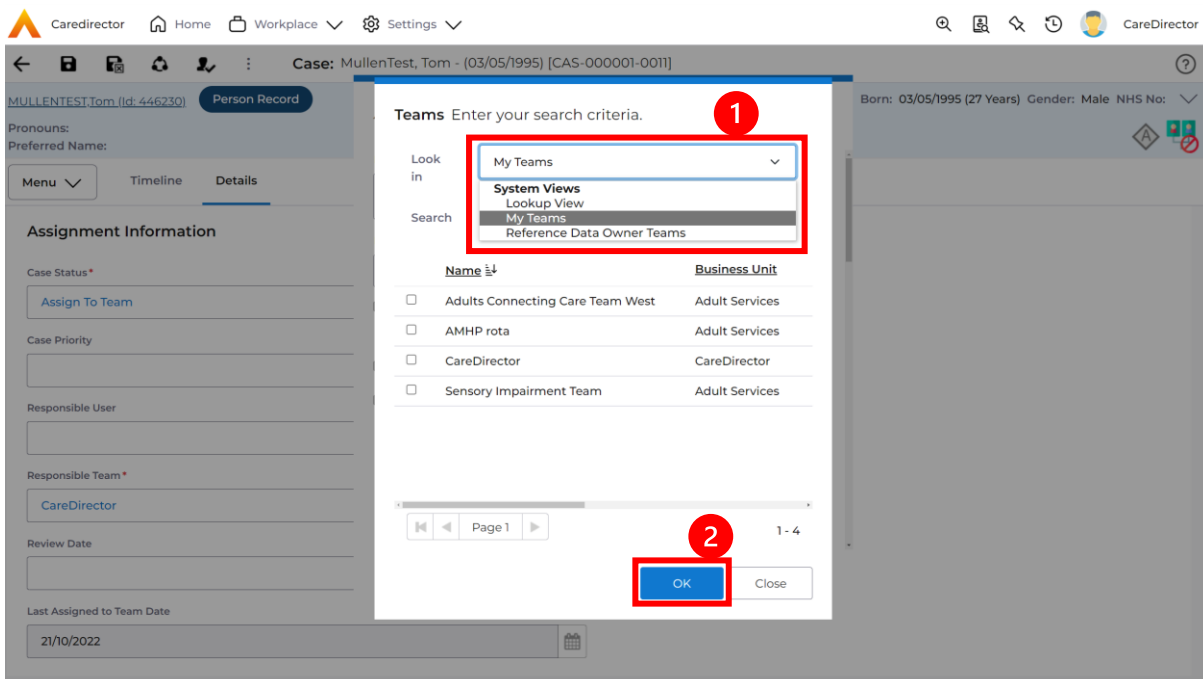
Responsible User [Q]

Responsible Team \*  
CareDirector [Q]

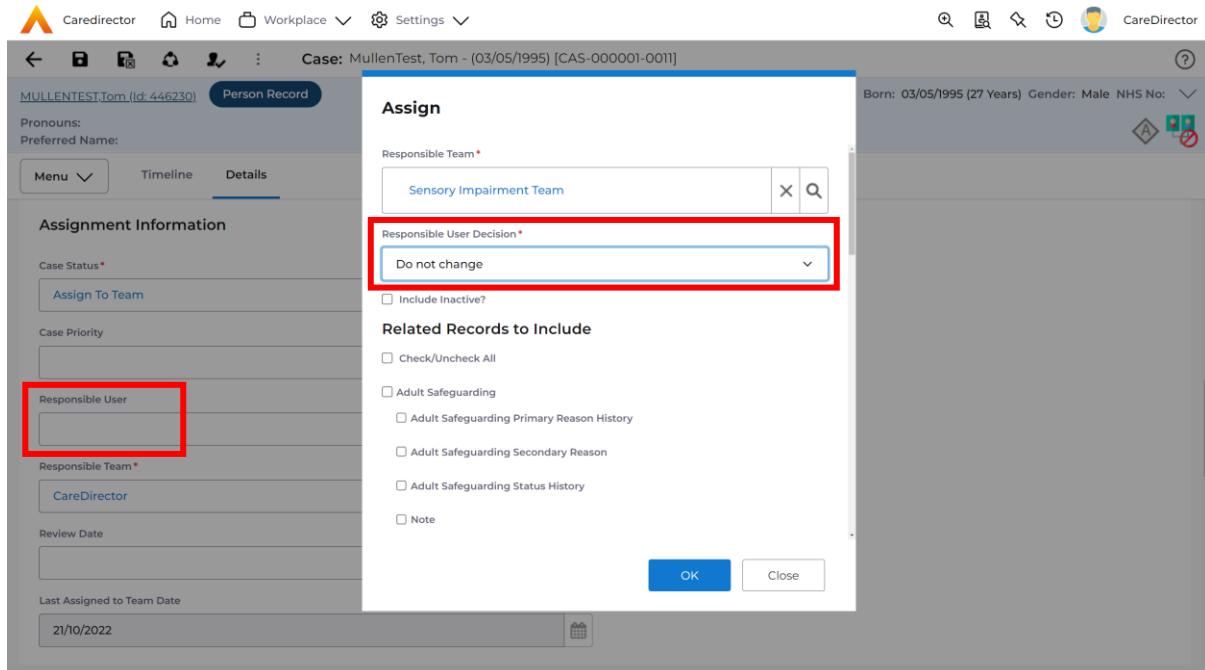
- This will open a separate window that will have further options. First select the new **Responsible Team** using the **Lookup** function.



- Use the **Look in** options to select the correct location before using the **search bar**. **My Teams** will show any team you are part of **Lookup View** will have every team using **CareDirector**. Once selected, press **OK**.



- The next section is going to ask what you want to do about the **Responsible User**. Due to the **Responsible User Workflow** being triggered, removing the current **Responsible User** from the field. We can leave this as **Do Not Change** however, if it has not removed it (you can check by looking at the field on screen) set it as **Clear on Current Record Only**.



- When finished, select **OK**. It will automatically **Save**; however, it is good practice to save what you have done. This then will be sent to the **Teams Dashboard** that has been selected.



## How to add an Involvement (Secondary Allocation)

1. Locate the **Case**.
2. Select **Menu**, **Care Network** select **Involvements**.

3. Within this screen, select **Create New Record** on the toolbar.

<input type="checkbox"/>	Involvement Member	Role	Involvement Re...	Case	Responsible Team	Start Date	E
<input type="checkbox"/>	Sensory Impairment Te...	* Secondary Team		Maisey, Test - (19/11/2000) [CAS-000001-0080]	Sensory Impairment Te...	31/08/2022	3
<input type="checkbox"/>	Community Occupatio...	* Secondary Team		Maisey, Test - (19/11/2000) [CAS-000001-0080]	Community Occupatio...	31/08/2022	3
<input type="checkbox"/>	Matt Davies	Responsible User		Maisey, Test - (19/11/2000) [CAS-000001-0080]	CareDirectorTest	30/08/2022	30
<input type="checkbox"/>	Matt Davies	Responsible User		Maisey, Test - (19/11/2000) [CAS-000001-0080]	CareDirectorTest	30/08/2022	
<input type="checkbox"/>	Matt Davies	* Secondary Wor...		Maisey, Test - (19/11/2000) [CAS-000001-0080]	CareDirectorTest	30/08/2022	3

- Under **Role** select **Secondary Worker**. Under **Involvement Member** choose the relevant **System User** using the **Lookup** function. Include an **Involvement Priority** and **Status** if required. When finished select **Save**.

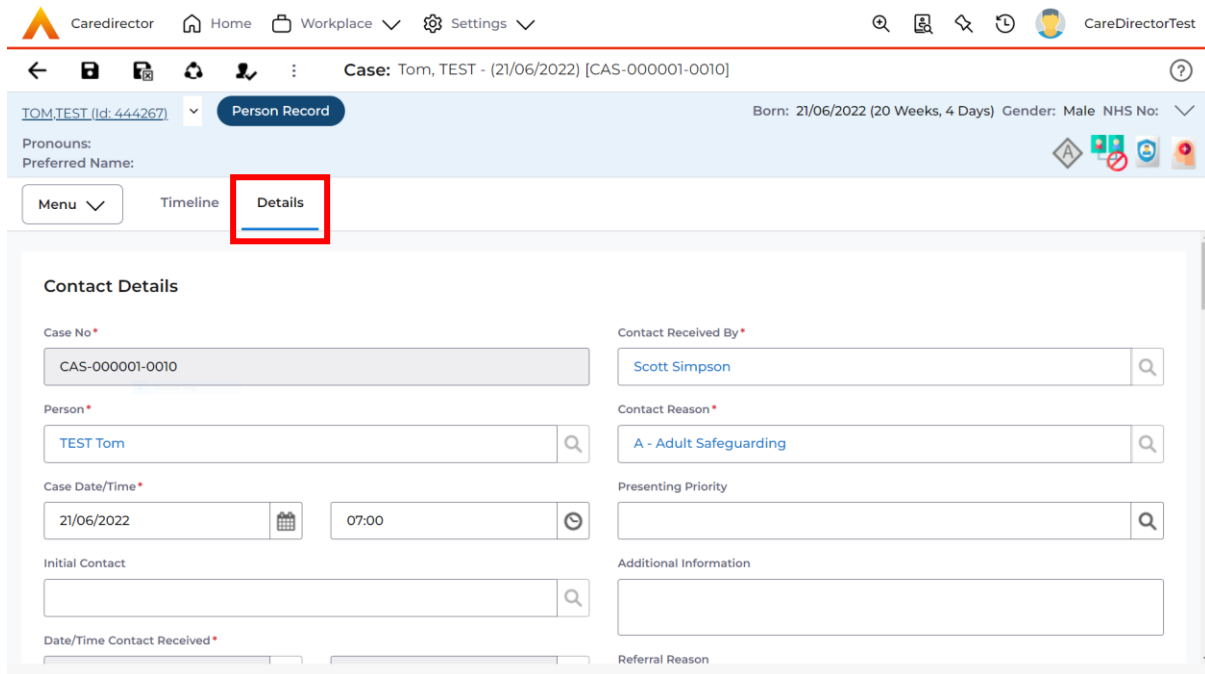
The screenshot shows the 'Case Involvement: New' form in the CareDirector system. The form is titled 'Details' and contains several fields for entering case information. The 'Role' field is highlighted with a red box and a red circle containing the number '2'. The 'Start Date' field is highlighted with a red circle containing the number '1'. The form includes the following fields:

- Case\*: Tom, TEST - (21/06/2022) [CAS-000001-0087]
- Responsible Team\*: CareDirectorTest
- Person\*: TEST Tom
- Involvement Member\*: Peter King
- Role\*: \* Secondary Worker
- Start Date\*: 04/10/2022
- Involvement Reason
- Responsible Team\*: CareDirectorTest
- Involvement Priority
- Involvement Status
- End Date
- Involvement End Reason
- Involvement Review Date

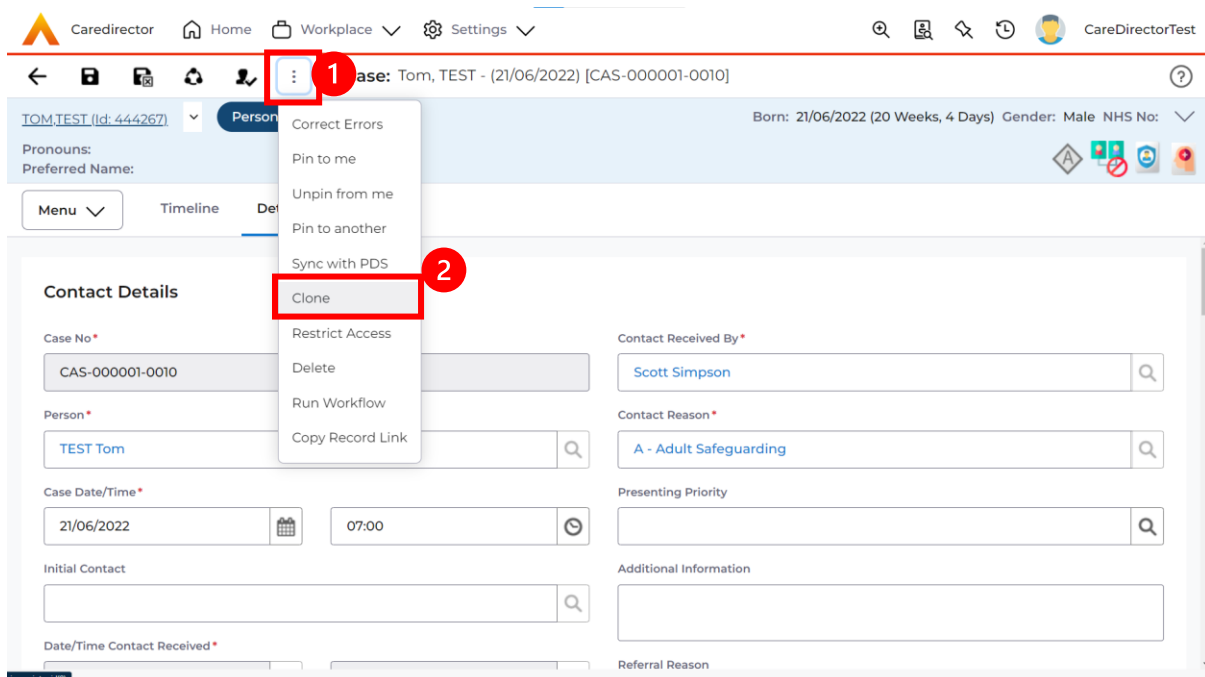
Description

## How to clone a Case

1. Locate the **Case** you want to **Clone**. Select **Details** tab.



2. Then select the **Three Dots** on the toolbar. Then select **Clone**.



- This will open the **Clone** window. Select a **Start Date** and checkbox the required place to put it. When done, select **Clone**.

Clone Social Care Case

1

Start Date/Time for Cloned Cases \*

12/11/2022

<input checked="" type="checkbox"/>	<u>Person Id</u>	<u>Person</u> ⌵	<u>Date of Birth</u>	<u>Gender</u>	<u>Relat</u>
2 <input checked="" type="checkbox"/>	444264	Tom MullenTest	03/05/1955	Male	Brot

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3

Clone Close

## How to find Activities

1. On your **Dashboard** under the **My Activities** tab, this will show all **Activities** that you need action or read.

My Active Tasks/Notes

Subject	Regarding	Priority	Event Date	Due	Created On	Created By	Modified On
<input type="checkbox"/> Case has been allocated	Tom, Test - (03/0...			31/10/2022 10:40:...	31/10/2022 10:40:...	Scott Simpson	31/10/2022 10
<input type="checkbox"/> Case has been allocated	Tom, Test - (03/0...			31/10/2022 10:29:11	31/10/2022 10:29:37	Scott Simpson	31/10/2022 10
<input type="checkbox"/> Case has been allocated	Test, Jayne - (06/...			28/10/2022 14:58:...	28/10/2022 14:58:...	Scott Simpson	28/10/2022 14
<input type="checkbox"/> New Occupational Therapy Referral	Occupational Th...			19/10/2022 00:00:...	19/10/2022 11:39:09	Test Adults Triage User	28/10/2022 14
<input type="checkbox"/> Case has been allocated	Test, Jayne - (06/...			28/10/2022 13:51:28	28/10/2022 13:51:31	Jayne Mullen	28/10/2022 13

2. If locating **Activities** on **Person Record** then locate the **Person Record**. Then select the tab **All Activities** then select **Search**.

Person: Test Tom

TOM,Test (Id: 446229) **Person Record** Born: 03/05/1996 (26 Years) Gender: Male NHS No: [dropdown]

Menu | Timeline | Summary | Profile | Cases | Services | Document View | **All Activities**

All Activities

Regarding	Subject	Activity	Status	Start/Due Date	Actual End	Case Note
<input type="checkbox"/> Test Tom	Case	Task	Open	03/11/2022 14:00:...		No
<input type="checkbox"/> Tom, Test - (03/0...	Case has been al...	Task	Open	31/10/2022 10:40:...		Yes
<input type="checkbox"/> Tom, Test - (03/0...	Case has been al...	Task	Open	31/10/2022 10:29:11		Yes
<input type="checkbox"/> Test Tom	Date of Death E...	Task	Open	26/10/2022 13:44:...		Yes
<input type="checkbox"/> Test Tom \ Willia...	Booking request...	Task	Open	21/10/2022 15:37:26		Yes
<input type="checkbox"/> Test Tom \ THE L...	Service provisio...	Task	Open	21/10/2022 01:00:...		Yes

Search [2]

- This can be filtered further using the options on the left. By default, the search will bring through all **Activities** that are linked to that **Service User** for the past month. Delete the **From Date** to bring through all.

The screenshot shows the CareDirector interface for a person named 'Test Tom'. The 'All Activities' filter panel is open on the left. The 'From' date field is highlighted with a red box and a '1' callout. The 'Search' button is highlighted with a red box and a '2' callout.

Regarding	Subject	Activity	Status	Start/Due Date	Actual End	Case Note
Test Tom	Case	Task	Open	03/11/2022 14:00:...		No
Tom, Test - (03/0...	Case has been al...	Task	Open	31/10/2022 10:40:...		Yes
Tom, Test - (03/0...	Case has been al...	Task	Open	31/10/2022 10:29:11		Yes
Test Tom	Date of Death E...	Task	Open	26/10/2022 13:44:...		Yes
Test Tom \ Willia...	Booking request...	Task	Open	21/10/2022 15:37:26		Yes
Test Tom \ THE L...	Service provisio...	Task	Open	21/10/2022 01:00:...		Yes

- If you want to see where that **Activity** is from. Look on the **Regarding** column.

The screenshot shows the CareDirector interface for a person named 'Test Tom'. The 'All Activities' table is displayed. The 'Regarding' column is highlighted with a red box.

Regarding	Subject	Activity	Status	Start/Due Date	Actual End	Case Note
Test Tom	Case	Task	Open	03/11/2022 14:00:...		No
Tom, Test - (03/0...	Case has been al...	Task	Open	31/10/2022 10:40:...		Yes
Tom, Test - (03/0...	Case has been al...	Task	Open	31/10/2022 10:29:11		Yes
Test Tom	Date of Death E...	Task	Open	26/10/2022 13:44:...		Yes
Test Tom \ Willia...	Booking request...	Task	Open	21/10/2022 15:37:26		Yes
Test Tom \ THE L...	Service provisio...	Task	Open	21/10/2022 01:00:...		Yes

## How to input an Activity

1. Locate the **Record**. Select **Menu** and **Activities** sub-category. Select the relevant **Activity** to input.

Case: Tom, TEST - (21/06/2022) [CAS-000001-0087]

TOM,TEST (id: 444267) Person Record Born: 21/06/2022 (14 Weeks, 6 Days) Gender: Male NHS No: [dropdown]

Pronouns: [dropdown]  
Preferred Name: [dropdown]

Menu ^

- Activities
- Appointments
- Case Notes
- Emails
- Letters
- Phone Calls
- Tasks
- Related Items
- Other information

Responsible User: [input field]

Responsible Team\*: AMHP Coordinator [input field]

2. Once the **Activity** has been selected, select the **Create New Record** from the toolbar.

Case: Tom, TEST - (24/07/1950) [CAS-000001-0018]

TOM,TEST (id: 444276) Person Record Born: 24/07/1950 (72 Years) Gender: Male NHS No: [dropdown]

Pronouns: [dropdown]  
Preferred Name: Tom

Menu v

+ [dropdown] Tasks

Related Records [dropdown] Search for records [input field]

<input type="checkbox"/>	Subject	Due	Status	Regarding	Reason	Responsible Team	Responsible User
<input type="checkbox"/>	CHC Funding Decision - Fully funded	24/06/2022 08:48:05	Open	Tom, TEST - (24/07/1950...		CareDirectorTest	
<input type="checkbox"/>	CHC Funding Decision - Fully funded	24/06/2022 08:48:05	Open	Tom, TEST - (24/07/1950...		CareDirectorTest	
<input type="checkbox"/>	CHC Funding Decision - Fully funded	24/06/2022 08:48:00	Open	Tom, TEST - (24/07/1950...		CareDirectorTest	
<input type="checkbox"/>	CHC Funding Decision - fully funded	24/06/2022 08:48:00	Open	Tom, TEST - (24/07/1950...		CMHT Older People Tea...	

3. Enter the relevant information. When finished, use the **Lookup** function to search for the **Workers** name in the **Responsible User** field. When allocated press **Save**. This will send the **activity** to their **dashboard**.

The screenshot shows the CareDirector web application interface. At the top, there is a navigation bar with 'Caredirector' and 'Home Workplace Settings' menus. Below this is a breadcrumb trail: 'Case Note (For Case): New'. The main content area is titled 'Person Record' and shows details for 'TOM.TEST (id: 444267)'. The 'Details' section contains a form with the following fields:

- Case \***: Tom, TEST - (21/06/2022) [CAS-000001-0087]
- Responsible Team \***: CareDirectorTest
- Responsible User**: Scott Simpson
- Reason**: (empty)
- Priority**: (empty)
- Date \***: (empty)
- Status \***: Open
- Category**: (empty)
- Sub-Category**: (empty)
- Outcome**: (empty)

At the bottom of the form, there is a checkbox labeled 'Contains Information Provided By A Third Party?'. A red box highlights the 'Responsible User' field, which contains 'Scott Simpson', with a red circle containing the number '1' next to it. Another red box highlights the 'Save' button in the top navigation bar, with a red circle containing the number '2' next to it.

4. You can input an **Activity** on a **Case, Person, Contact, Service Provision** and **Financial Assessment**.



## How to change status to Complete (Re-activate Activities)

1. Select the **Form** or **Activity** that requires to be **Completed**. This will send an **Activity** to your **Team Managers** dashboard for them to approve.
2. Under **Status** use the dropdown list to select **Completed**. After select **Save**.

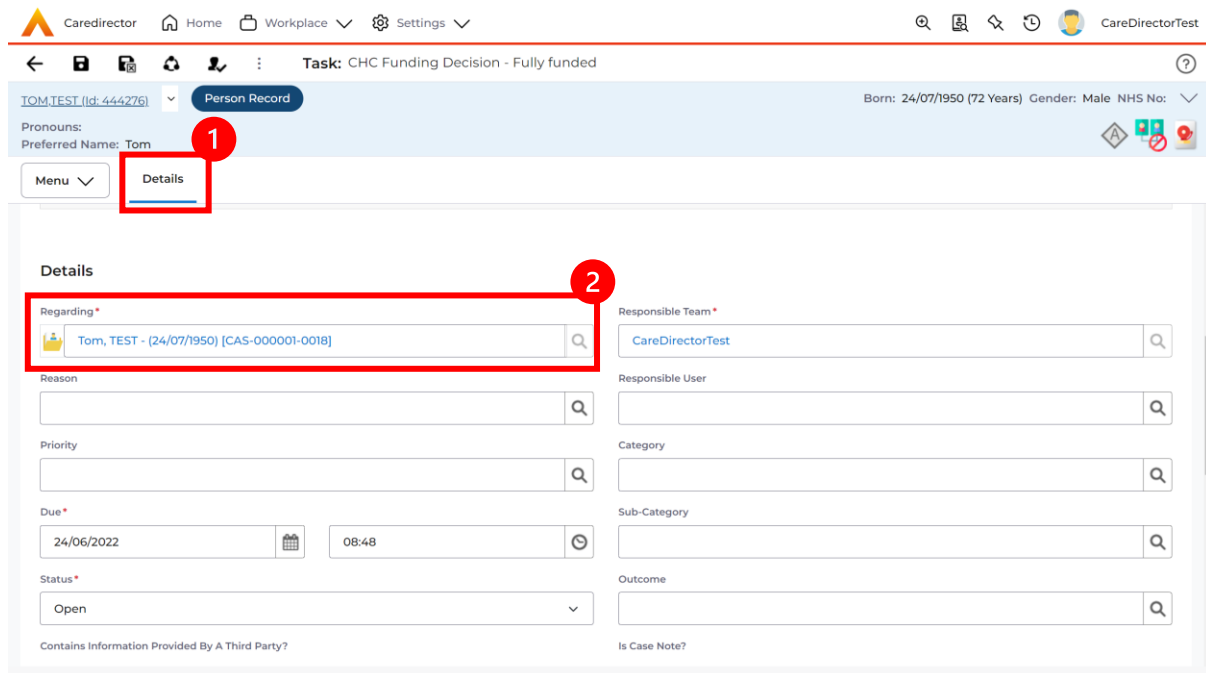
The screenshot shows the CareDirector interface. At the top, there are navigation icons for Home, Workplace, and Settings. The main header displays the user's name 'CareDirectorTest'. Below this, a toolbar contains several icons, including a 'Save' icon (a square with a checkmark) which is circled in red with a '2'. The main content area shows a form for a case titled 'Form (Case): Adult - Change to Service Request for MullenTest, Tom - (03/05/1955)'. The form includes fields for Case, Responsible Team, Form Type, Responsible User, Due Date, and Review Date. A red box highlights the 'Status' dropdown menu, which is open and shows 'Complete' selected. A red circle with the number '1' is next to the dropdown.

3. **Activity Only:** If there are changes needed to be made after saving and completing, to re-activate the **Activity** is through the **Activate** icon on the toolbar.

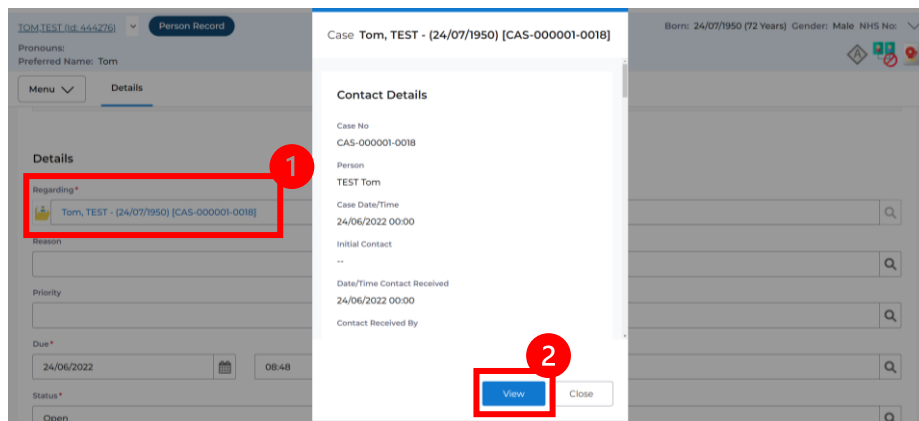
The screenshot shows the CareDirector interface. At the top, there are navigation icons for Home, Workplace, and Settings. The main header displays the user's name 'CareDirectorTest'. Below this, a toolbar contains several icons, including a dropdown menu icon (three dots) which is circled in red with a '1'. The main content area shows a task titled 'Task: Test Task for Case'. A dropdown menu is open, showing options: 'Activate', 'Delete', 'Run Workflow', and 'Copy Record Link'. The 'Activate' option is circled in red with a '2'.

## How to tell if an Activity is linked to a Case or Person Record

1. When opening an **Activity** from the **Dashboard** it can be hard to tell where it is linked. Once opened, scroll down to **Details** heading under the **Details** tab, and look at **Regarding**.



2. If the symbol is a folder and the name in the field has **(CAS-XXXXXXX)** then it is linked to a **Case**.
3. If the symbol is a Person and the field has a name only e.g. **Tom, Test**. It is linked to a **Person Record**.
4. If needed, you can select the name in the field in **Regarding**, (it does not matter if it is a **Case** or a **Person Record**) and go into the record by selecting **View**.



## How to Allocate a new Activity to another team

1. Before saving a new **Activity**, you can assign it to another team. Under **Responsible Team** select the **Team** you would like to action this using the **Lookup** function.

The screenshot shows the 'Task: New' form in CareDirector. The 'Responsible Team' field is highlighted with a red box and a red circle containing the number 1. The dropdown menu is open, showing 'CareDirector' as the selected option. Other fields include 'Regarding' (MullenTest\_Tom - (03/05/1995) [CAS-000001-001]), 'Reason', 'Priority', 'Due', 'Status' (Open), 'Responsible User' (Scott Simpson), 'Category', 'Sub-Category', and 'Outcome'.

2. Use the **Look in** options to select the correct location before using the **search bar**. **My Teams** will show any team you are part of **Lookup View** will have every team using **CareDirector**. Once selected, press **OK**.

The screenshot shows the 'Task: New' form with a 'Teams' lookup dialog box open. The dialog box has three red circles: 1 points to the 'Look in' dropdown (set to 'My Teams'), 2 points to the 'CareDirector' team in the list, and 3 points to the 'OK' button. The list of teams is as follows:

Name	Business Unit
<input type="checkbox"/> Adults Connecting Care Team West	Adult Services
<input type="checkbox"/> AMHP rota	Adult Services
<input type="checkbox"/> CareDirector	CareDirector
<input type="checkbox"/> Sensory Impairment Team	Adult Services

3. If you know the **Responsible User** use the **Lookup** function, and select the System User. However, if you do not know the **Allocated Worker** then press the **X** on the **Responsible User** field. Then select **Save** when done.

The screenshot shows the CareDirector interface for a 'Person Record'. At the top, there is a navigation bar with 'Caredirector', 'Home', 'Workplace', and 'Settings'. Below this is a breadcrumb trail: 'MULLENTEST, Tom (Id: 446230) > Person Record'. The main form area is titled 'Details' and contains several fields:

- Regarding\***: MullenTest, Tom - (03/05/1995) [CAS-000001-001] (with an 'X' icon)
- Responsible Team\***: Sensory Impairment Team (with an 'X' icon)
- Reason**: (empty field)
- Responsible User**: Scott Simpson (with an 'X' icon and a red box labeled '1')
- Priority**: (empty field)
- Category**: (empty field)
- Due\***: (empty field)
- Sub-Category**: (empty field)
- Status\***: Open (dropdown menu)
- Outcome**: (empty field)

At the bottom, there are two radio button options:

- Contains Information Provided By A Third Party?  
 Yes  
 No
- Is Case Note?  
 Yes  
 No

A red box with a '2' in a red circle highlights the 'X' icon in the top navigation bar.

## How to Allocate an existing Activity to another team

1. Locate the **Activity** and decide what is required for the **Responsible User** field. If you know who the **Responsible User** is, then select them through the **Lookup** function. However, if you do not know who the **Responsible User** will be then select the **X** on the **Responsible User** field. Then select **Save**.

The screenshot shows the CareDirector interface for a task. The 'Details' section contains the following fields:

- Regarding\***: MullenTest, Tom - (03/05/1995) [CAS-000001-001]
- Responsible Team\***: Sensory Impairment Team
- Reason**: (Empty)
- Responsible User**: Scott Simpson (with an 'X' button highlighted by a red box and a '1' in a red circle)
- Priority**: (Empty)
- Category**: (Empty)
- Due\***: 28/10/2022, 08:00
- Sub-Category**: (Empty)
- Status\***: Open
- Outcome**: (Empty)

2. Next select **Assign this record to another team** from the toolbar.

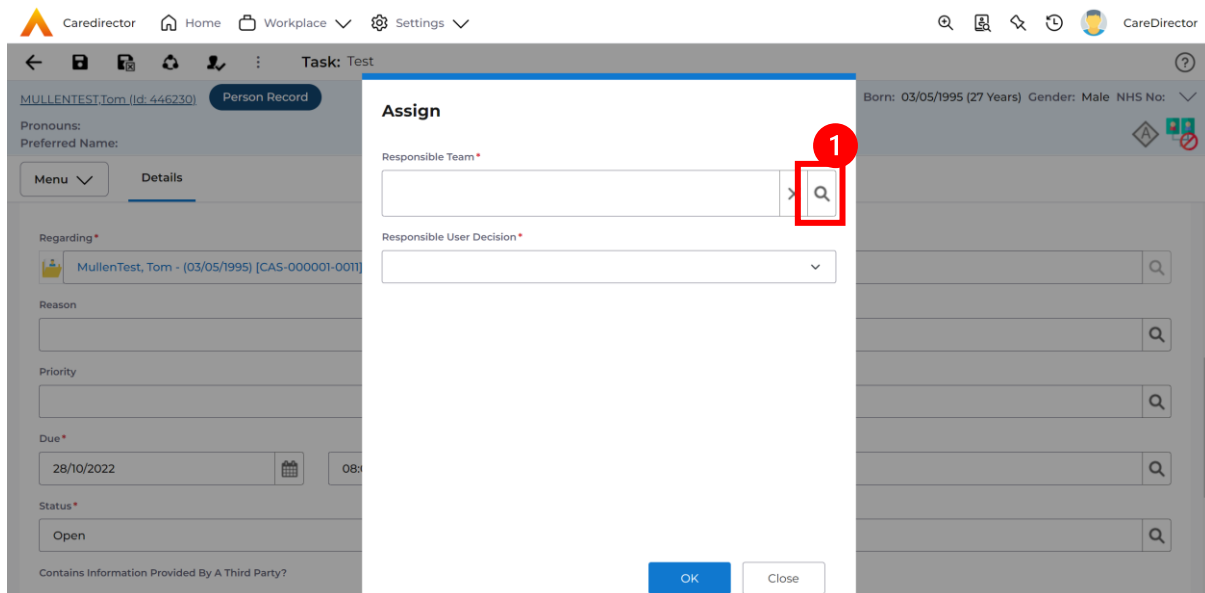
The screenshot shows the CareDirector interface for a task. The toolbar at the top contains the following icons:

- Home
- Workplace
- Settings
- Search
- Print
- Refresh
- Assign this record to another team (highlighted with a red box and a '1' in a red circle)
- Task: Test

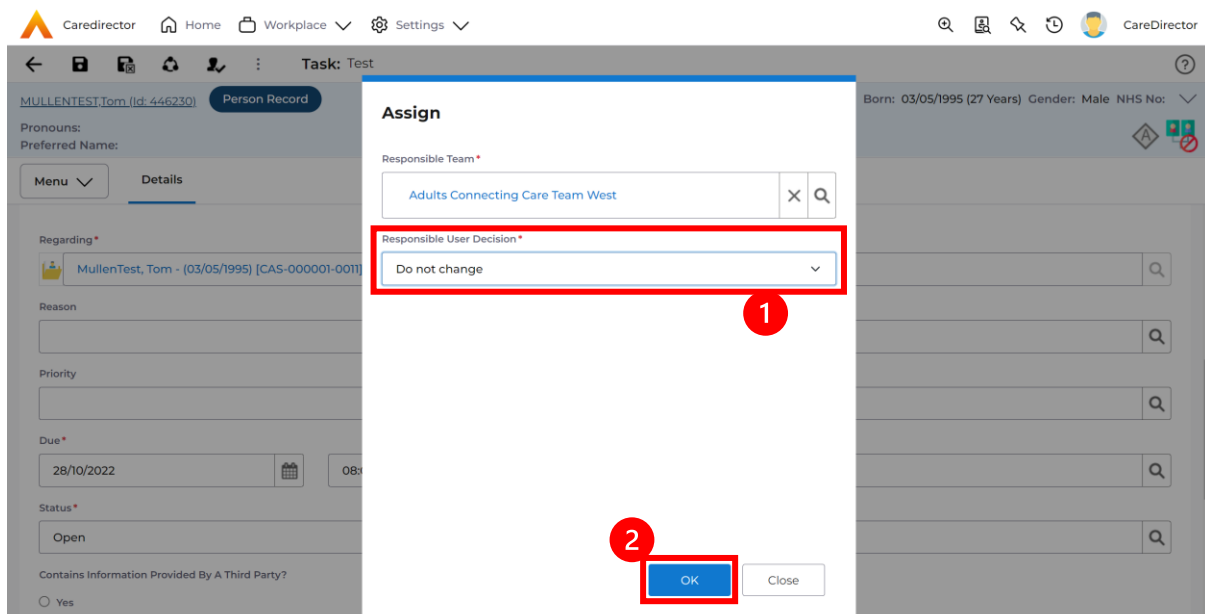
The 'Details' section contains the following fields:

- Regarding\***: MullenTest, Tom - (03/05/1995) [CAS-000001-001]
- Responsible Team\***: Sensory Impairment Team
- Reason**: (Empty)
- Responsible User**: (Empty)
- Priority**: (Empty)
- Category**: (Empty)
- Due\***: 28/10/2022, 08:00
- Sub-Category**: (Empty)
- Status\***: Open
- Outcome**: (Empty)
- Contains Information Provided By A Third Party?**: (Empty)
- Is Case Note?**: (Empty)

- This will open a new window. Choose the **Responsible Team** that this **Activity** will be sent to using the **Lookup** function. Remember to use **Look in** once selected to pick from other teams.



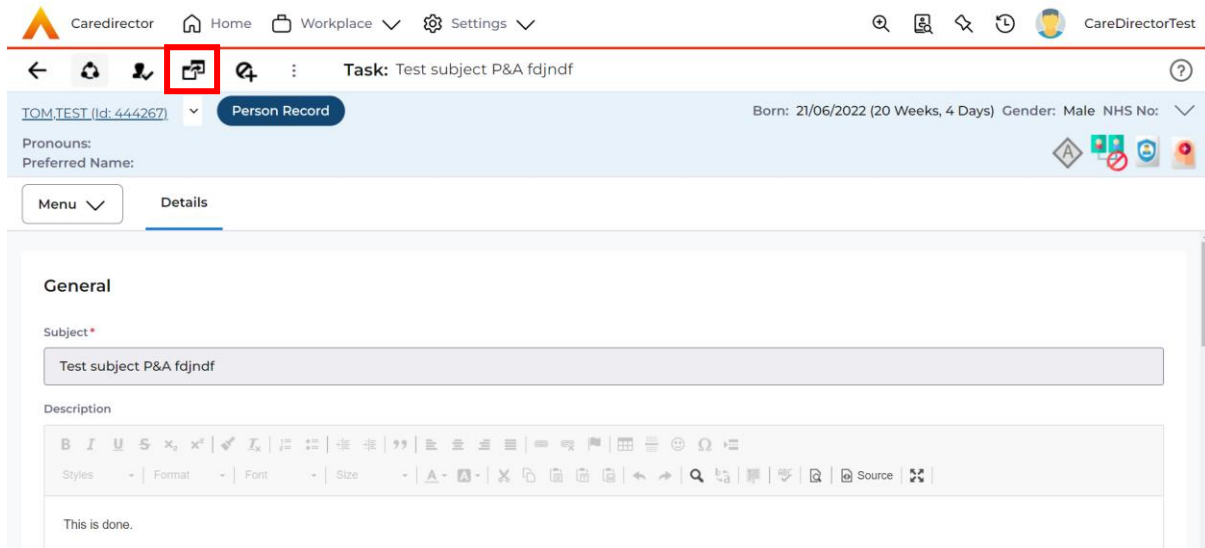
- Then under **Responsible User Decision** due to us already deciding what is going to happen with the current **Responsible User** then select **Do Not Change**. If you did not choose already and you do not know who the new **Responsible User** will be then select, **Clear on Current Record Only**. Then select **OK**.



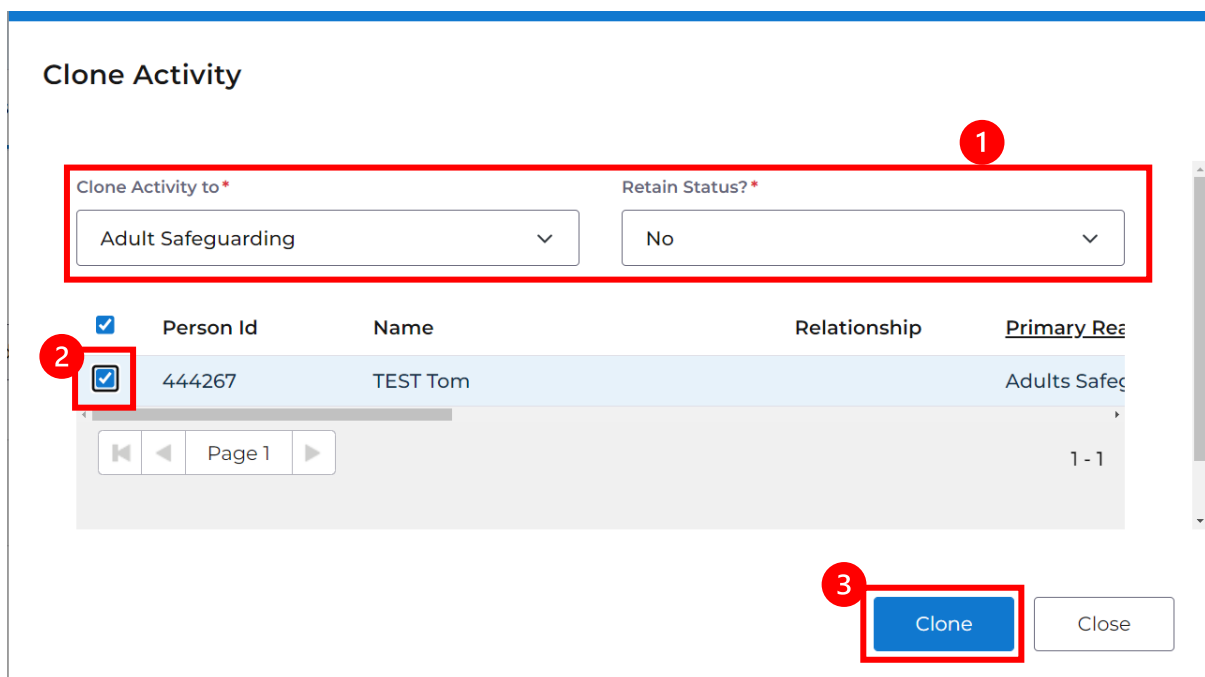
- The **Activity** will automatically **Save** and will be sent to the new **Responsible Team** dashboard.

## How to Clone Activities

1. Locate the **Activity** that requires **Cloning**. Then select the **Clone** icon from the toolbar.

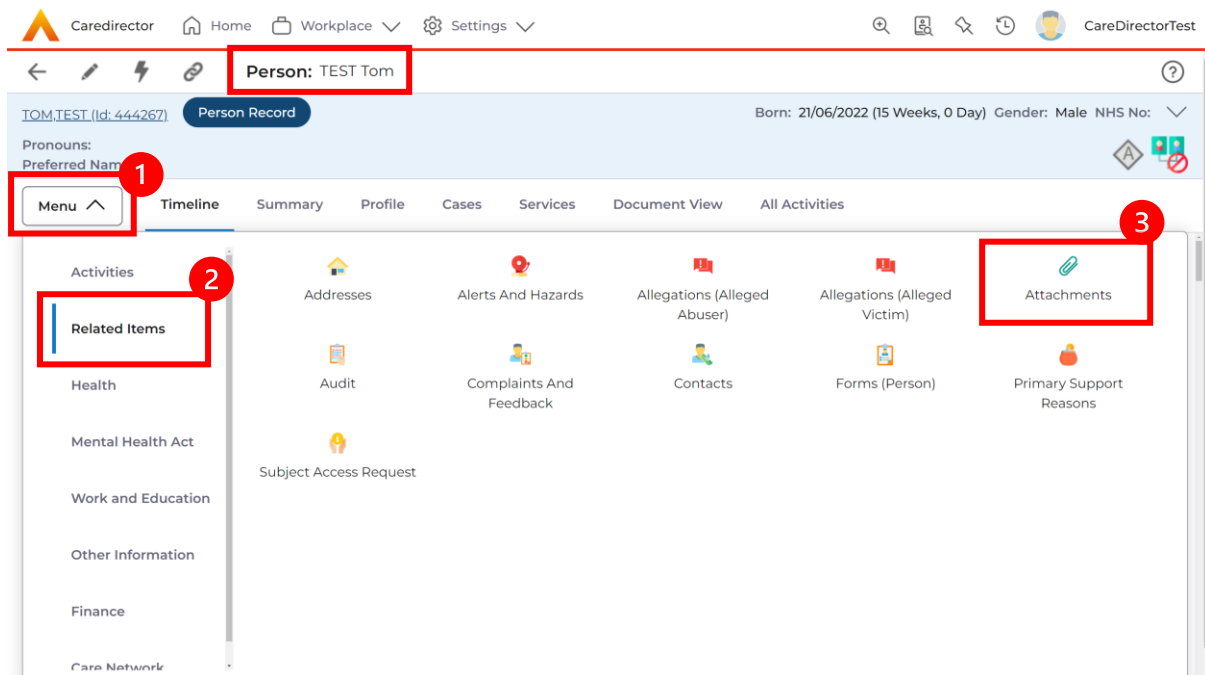


2. This will open a **Clone** window. Choose where the **Activity** will be **Cloned to** and if you want to **Retain the Status** that it has (Completed, Open, Cancelled). Check box the **Service User** you want it to go to and then when done, select **Clone**.

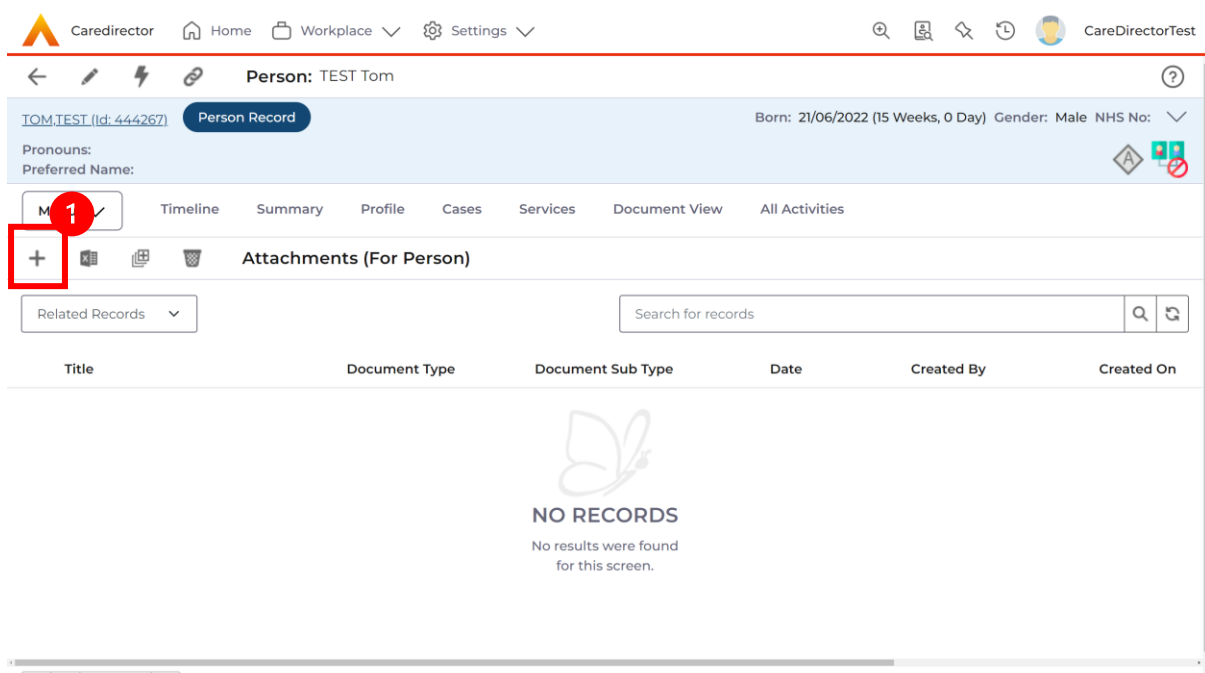


## How to upload Attachments

1. Locate the **Record** you want to upload an attachment too. This will work the same way for all **records**. Open the **Menu**, **Related Items** and then select **Attachments**.



2. When opened, select the **Create New Record** from the toolbar.

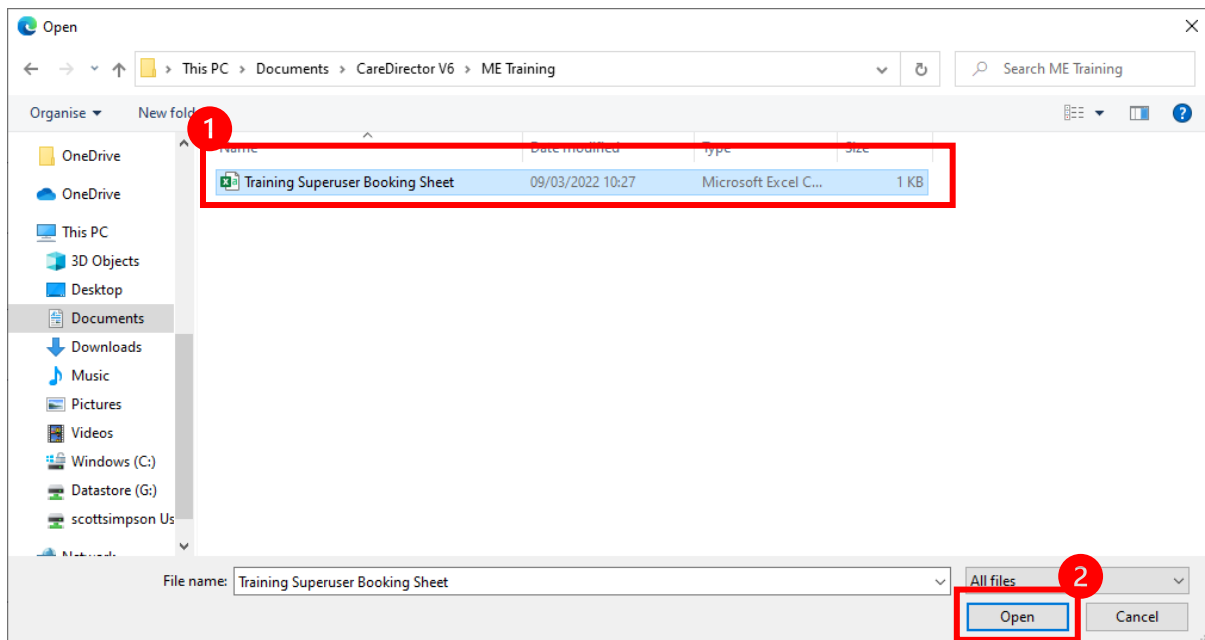




3. Fill in the mandatory fields. When finished, select the **Browse** button in the **File** field.

The screenshot shows the 'Attachment (For Person): New' form in CareDirector. The 'File' field is highlighted with a red box and a red circle containing the number 1. The 'Browse' button is also highlighted with a red box. Other fields include 'Person' (TEST Tom), 'Responsible Team' (CareDirectorTest), 'Title' (Test Document Upload), 'Date' (04/10/2022), 'Document Type' (Clients), and 'Declared' (No).

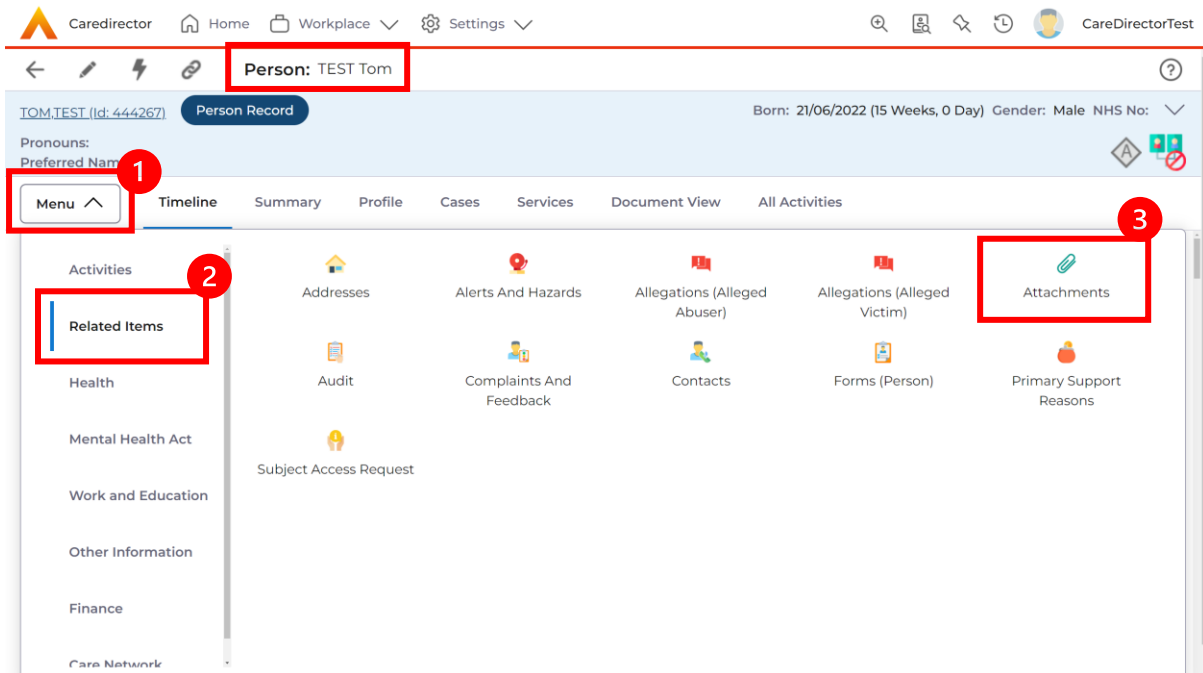
4. Select a **File** from your computer/ SharePoint and select **Open**.



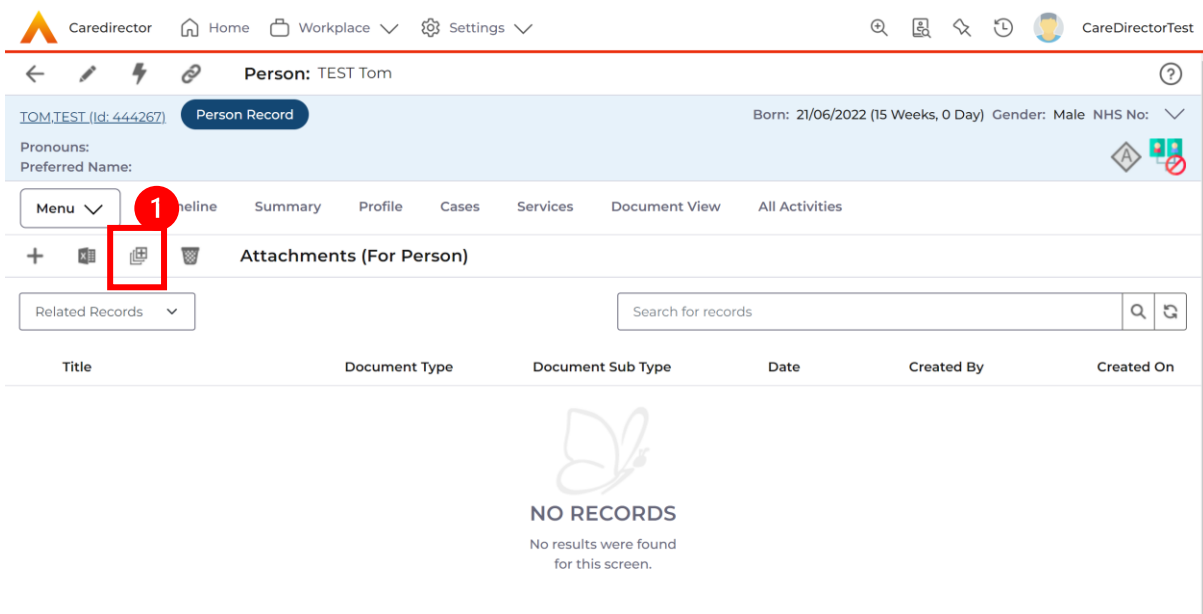
5. After uploading, the file name will appear and then select **Save** from the toolbar.

## How to upload multiple attachments

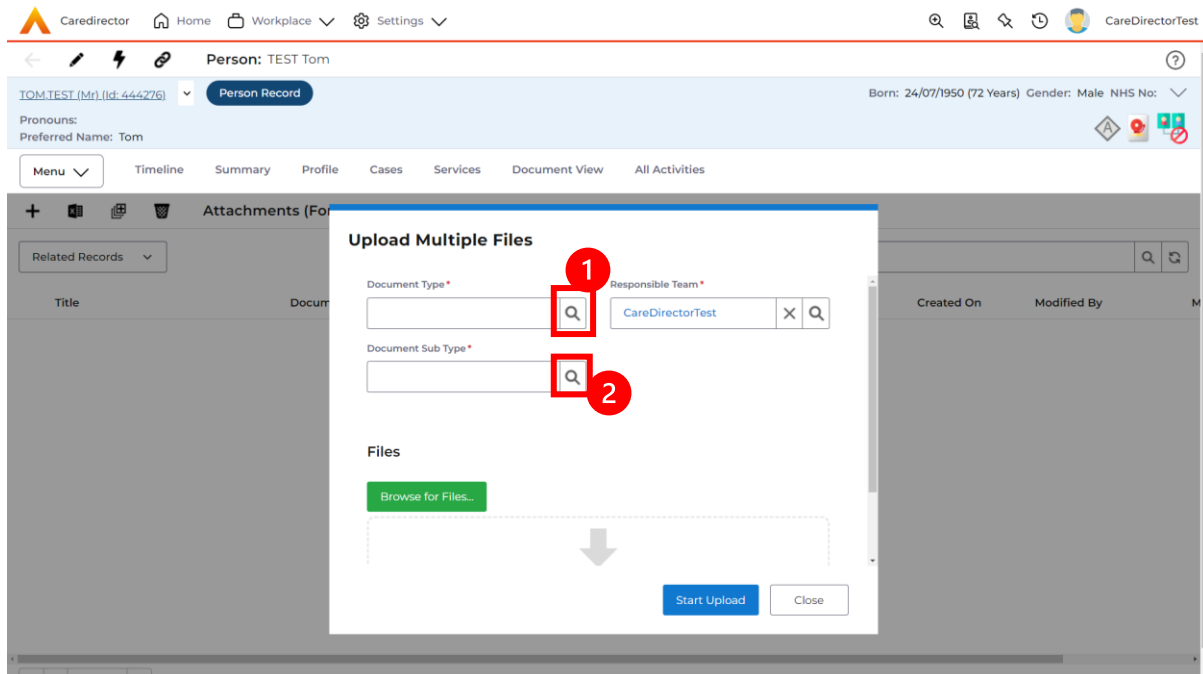
1. Locate the **Record** you want to upload an attachment too. This will work the same way for all **records**. Open the **Menu, Related Items** and then select **Attachments**.



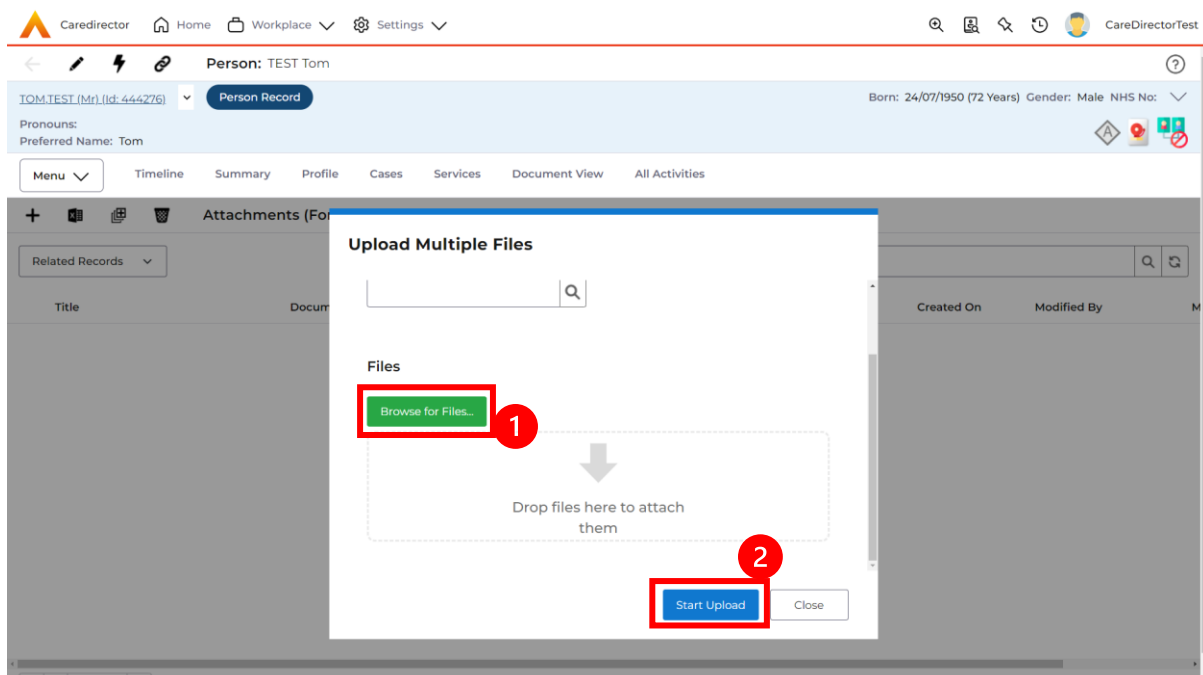
2. When opened, select the **Upload Multiple Files** from the toolbar. Ensure that all attachments are of the same **Document Type**.



- This will open a window and the **Document Type** and **Document Sub Type** needs to be chosen using the **Lookup** function.



- If **Browse for Files** is selected, you can only select one file at a time, but you can do it multiple times. However, if you open the **File Explorer** separately and click on all files using **Ctrl + Left Click** you can click, drag, and drop in the **Drop files here to attach them** box. When done, select **Start Upload**.



## How to find a Form (Case)

1. Locate the **Case** the **Form** is in. Open **Menu**, select **Related Items** and then select **Forms (Case)**.

The screenshot shows the CareDirector interface for a case named 'Tom, TEST - (21/06/2022) [CAS-000001-0087]'. The breadcrumb trail is 'Case: Tom, TEST - (21/06/2022) [CAS-000001-0087]'. The main navigation menu is open, showing 'Related Items' selected. Under 'Related Items', 'Forms (Case)' is highlighted. The timeline on the right shows three events: 'Form (Case) Created', 'Case Involvement Updated', and 'Case Involvement Created'.

2. Select the relevant for **Form** to open.

The screenshot shows the 'Forms (Case)' view in CareDirector. The breadcrumb trail is 'Case: Tom, TEST - (21/06/2022) [CAS-000001-0087]'. The main navigation menu is open, showing 'Forms (Case)' selected. The 'Related Records' section contains a table with the following data:

<input type="checkbox"/>	Due Date	Form Type	Start Date	Status	Responsible User	Responsible Team	Completed By	Completion Date	Sign
<input type="checkbox"/>		AMHP Report Form	21/09/2022	In Progress	Scott Simpson	CareDirectorTest			

## How to add a Form

1. Whilst on the **Person Record**. Select the **Cases** tab to find the current **Case**.  
When found, select it to open the **Case Record**.

Person: TEST Tom

Person Record

Born: 21/06/2022 (14 Weeks, 6 Days) Gender: Male NHS No: [dropdown]

Menu | Timeline | Summary | Profile | **Cases** | Services | Document View | All Activities

Responsible Team	Responsible User	Case Date/Time	Contact Reason	Case No	Presenting Priority	Case Status
CareDirector Support		21/06/2022 07:00:00	A - Adult Safeguarding	CAS-000001-0010		Assign To Team
AMHP Coordinator		20/09/2022 09:20:00	A - AMHP Assessment	CAS-000001-0087		Assign To Team

2. When the **Case Record** is open, select **Menu**, **Related Items** and then **Form (Case)**.

Case: Tom, TEST - (21/06/2022) [CAS-000001-0087]

Person Record

Born: 21/06/2022 (15 Weeks, 0 Day) Gender: Male NHS No: [dropdown]

Menu ^ | Timeline | Details

Activities | Actions | Adult Safeguarding | Attachments | Audit | Deprivations Of Liberty | **Forms (Case)** | Involvements

Other Information | Involvements History | Joint Case Members | Status History

Team

Profession Type

Reset Refresh Apply

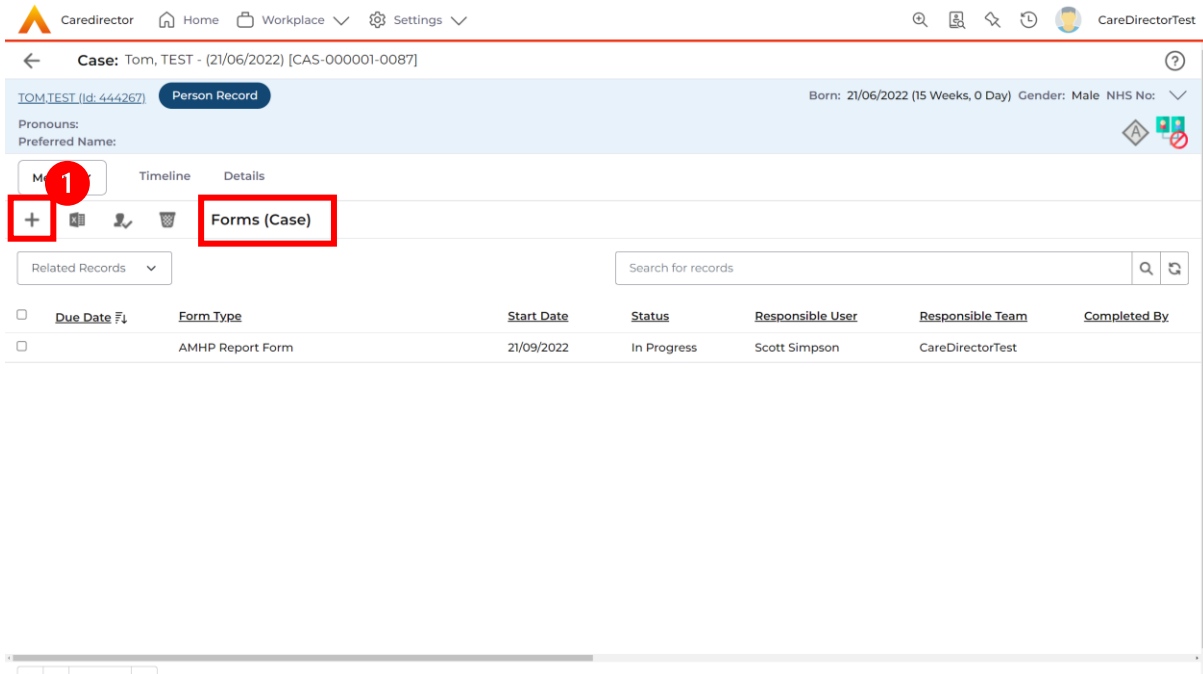
**Form (Case) Created** 21/09/2022 13:04:25  
A new record of form (case) was created by Scott Simpson.

Due Date: Form Type: AMHP Report Form Status: In Progress

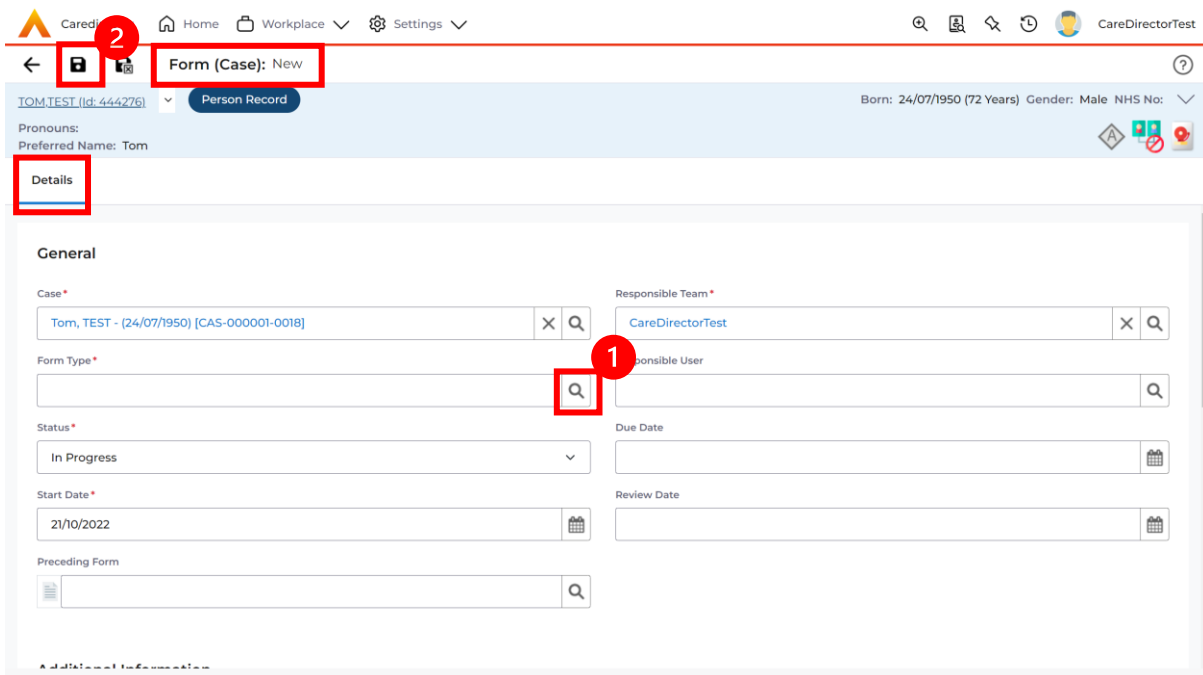
**Case Involvement Updated** 21/09/2022 12:23:12  
Scott Simpson changed End Date from 'Empty' to '21/09/2022'.

Involvement Member: Community Occupational Therapy Service Role: Occupational Therapist Start Date: 21/09/2022

3. Select **Create New Record** from the toolbar. Please note the title, if you want to add a **Form** to a **Case** check that the title says **Form (Case)**.



4. Once inside the **Details**. This section focuses on telling CareDirector which **Form** you would like to be worked on. Select this using the **Lookup** function of the field **Form Type**. When finished, select **Save**.



5. Now that CareDirector has given us the correct **Form**, the **Edit** button appears on the toolbar. This will allow us to go into the **Form** and fill it out.

The screenshot shows the CareDirector interface for a case titled "Form (Case): AMHP Report Form for Tom, TEST - (21/06/2022) [CAS-00001-0087]". The user is logged in as "CareDirectorTest". The page displays a "Person Record" for "TOM,TEST (Id: 444267)". The main content area is titled "General" and contains several form fields:

- Case \***: Tom, TEST - (21/06/2022) [CAS-00001-0087]
- Form Type \***: AMHP Report Form
- Status \***: In Progress
- Start Date \***: 21/09/2022
- Responsible Team \***: CareDirectorTest
- Responsible User**: Scott Simpson
- Due Date**: (empty)
- Review Date**: (empty)
- Preceding Form**: (empty)

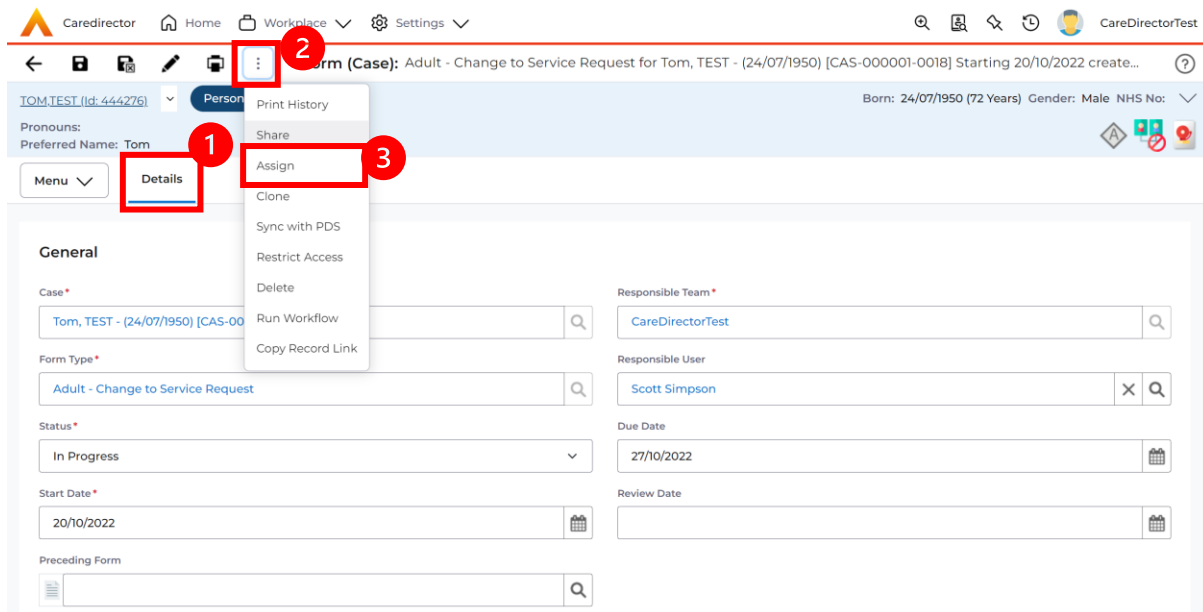
6. Fill out the **Form** accordingly and then **Save and Return to Previous Page**.

The screenshot shows the CareDirector interface for the "AMHP Report Form". The user is logged in as "CareDirectorTest". The page displays a "Person Record" for "TOM,TEST (Id: 444267)". The main content area is titled "AMHP Report Form" and contains several form sections:

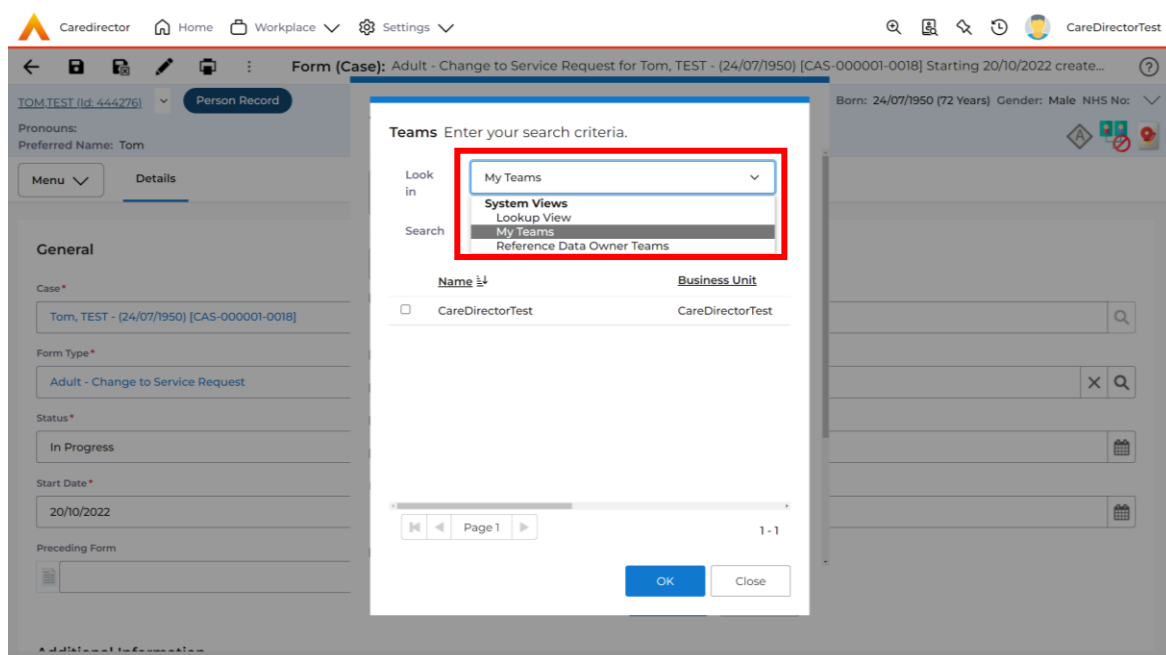
- Client previously known to services?**: Radio buttons for Yes and No.
- Ethnic Origin**: Radio buttons for various ethnic groups:
  - White - British / Northern Irish
  - White - Irish
  - White - Gypsy or Irish Traveller
  - White - Eastern European
  - Mixed - White and Black African
  - Mixed - White and Black Caribbean
  - Mixed - White and Asian
  - Mixed - Other / Multiple

## How to Allocate a Form

1. Once a **Form** has been filled out and it needs to be sent to another team to action it. On the **Details** tab select the **Assign** inside the **Three Dots** on the toolbar.



2. This will open a separate window for you to allocate this **Form** to another **Team**. Remember to select **Look in** and change to **Lookup View** to find teams.





3. Once the appropriate team has been selected and your selection looks the same as this on screen (apart from responsible team) then select **OK**.

The screenshot shows the 'Assign' dialog box in the CareDirector system. The dialog is titled 'Assign' and contains the following fields and options:

- Responsible Team \***: A search field containing 'Accommodation Team'.
- Responsible User Decision \***: A dropdown menu with 'Clear on current record only' selected.
- Include Inactive?**: A checkbox that is currently unchecked.
- Related Records to Include**: A list of checkboxes, all of which are checked:
  - Check/Uncheck All
  - Appointment
  - Assessment Factor
  - Attachment (Case Form)
  - Email
  - Email Attachment
- Buttons**: 'OK' and 'Close' buttons at the bottom right.

## How to Clone a Form

1. Locate the **Case** the **Form** is in. Open **Menu**, select **Related Items** and then select **Forms (Case)**.

The screenshot shows the CareDirector interface for a case record. The breadcrumb path is 'Case: Tom, TEST - (21/06/2022) [CAS-000001-0087]'. The 'Menu' dropdown is open, showing 'Related Items' selected. The 'Forms (Case)' option is highlighted in the 'Related Items' submenu. The main content area displays a timeline of events:

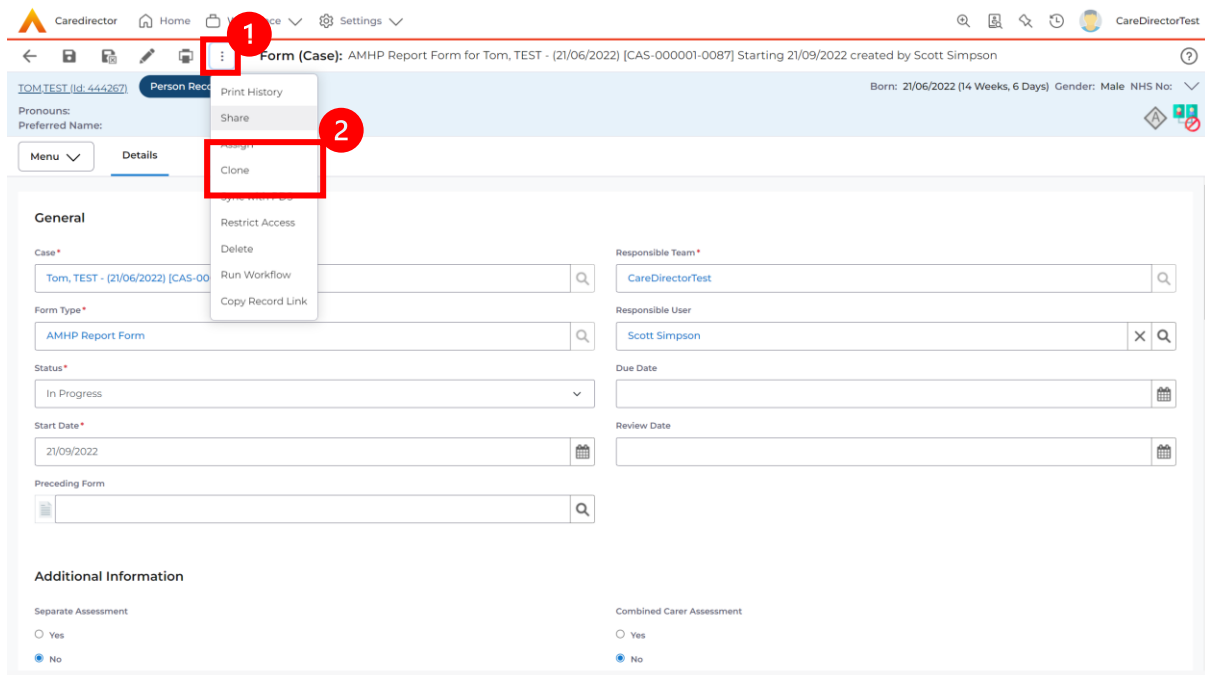
- Form (Case) Created** (21/09/2022 13:04:25): A new record of form (case) was created by Scott Simpson. Form Type: AMHP Report Form, Status: In Progress.
- Case Involvement Updated** (21/09/2022 12:23:12): Scott Simpson changed End Date from 'Empty' to '21/09/2022'. Involvement Member: Community Occupational Therapy Service, Role: Occupational Therapist, Start Date: 21/09/2022.
- Case Involvement Created** (21/09/2022 12:37:20): A new record of case involvement was created by Scott Simpson.

2. Select the relevant for **Form** to open.

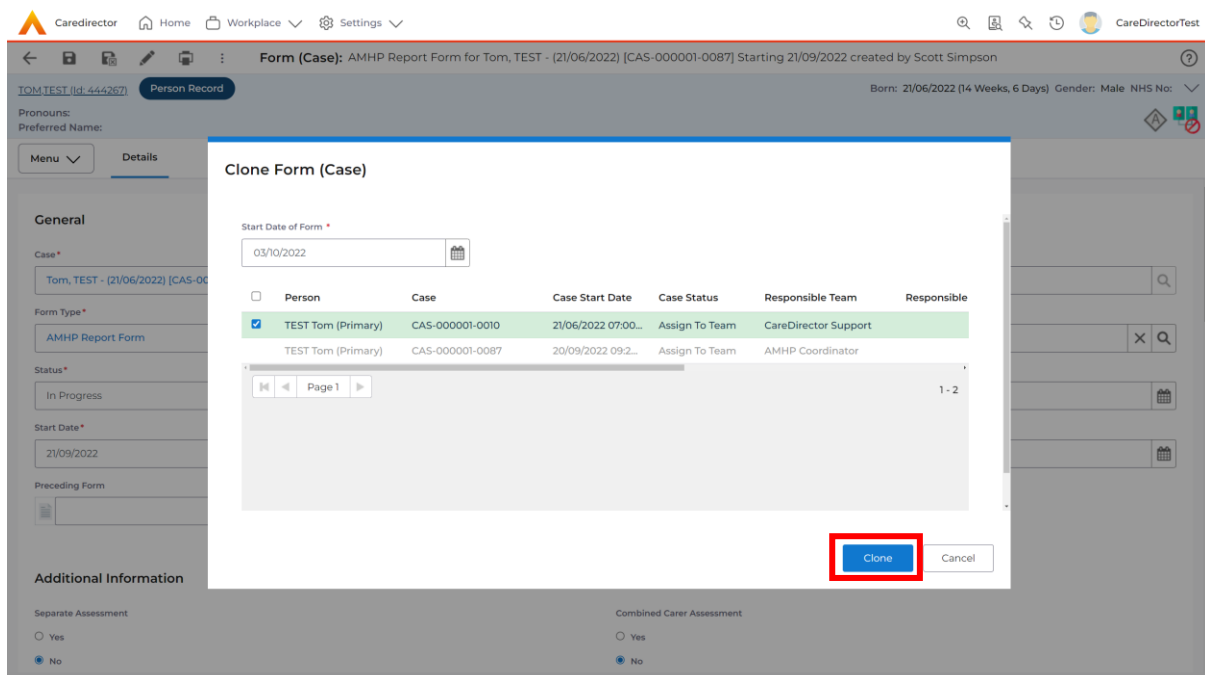
The screenshot shows the 'Forms (Case)' view in CareDirector. The breadcrumb path is 'Case: Tom, TEST - (21/06/2022) [CAS-000001-0087]'. The 'Forms (Case)' section is active, showing a list of related records. The table below displays the details of the selected form:

Due Date	Form Type	Start Date	Status	Responsible User	Responsible Team	Completed By	Completion Date	Sign
	AMHP Report Form	21/09/2022	In Progress	Scott Simpson	CareDirectorTest			

3. From the toolbar, select the **Three Dots** and select **Clone**.



4. It will open a new window. Enter the **Start Date of Form**. Select which **Case** you would like this **Form** to be **Cloned** to. When checked, select **Clone**.



5. You do not need to **Save** this.

- Please note: If you would like to **Clone** a **Form** that has another **Status** other than **closed**. You cannot have two **Forms** that are the same in the same **Case**. Therefore, if you want to **Clone** a **Form** to the same **Case** ensure that you **Closed** that **Form** first and get that signed off by the appropriate **System User**.

The screenshot shows the CareDirector interface. At the top, there is a navigation bar with 'Caredirector', 'Home', 'Workplace', and 'Settings'. The main header displays the current form: 'Form (Case): Adult Care and Support Plan for Tom, TEST - (21/06/2022) [CAS-000001-0087] Starting 09/11/2022...'. Below this, a user profile for 'TOM TEST (id: 444267)' is shown with a 'Person Record' button and personal details: 'Born: 21/06/2022 (20 Weeks, 3 Days) Gender: Male NHS No:'. A 'Menu' dropdown and 'Details' tab are visible.

The main content area is titled 'General' and contains the following fields:

- Case\***: Tom, TEST - (21/06/2022) [CAS-000001-0087]
- Form Type\***: Adult Care and Support Plan
- Status\***: Closed
- Start Date\***: 09/11/2022
- Preceding Form**: (Empty search field)
- Responsible Team\***: CareDirectorTest
- Responsible User**: Scott Simpson
- Due Date**: 11/11/2022
- Review Date**: (Empty search field)

The 'Completion Details' section contains:

- Completed By\***: Scott Simpson
- Completion Date\***: 09/11/2022
- Signed Off By\***: Scott Simpson
- Signed Off Date\***: 09/11/2022

## How to reactivate a Closed Form

1. Locate the **Form** that needs to be **reactivated**.  
Please note: If the same **Form Type** is open, you cannot **Reactivate** it.

The screenshot shows the CareDirector interface. At the top, there is a navigation bar with 'Caredirector', 'Home', 'Workplace', and 'Settings'. Below this is a breadcrumb trail: 'Form (Case): Occupational Therapy Conversation Record for Tom, TEST - (21/06/2022) [CAS-000001-0010] St...'. The main content area is titled 'Person Record' and shows details for 'TOM.TEST (Id: 444267)'. The form details are as follows:

Field	Value
Case *	Tom, TEST - (21/06/2022) [CAS-000001-0010]
Form Type *	Occupational Therapy Conversation Record
Status *	Closed
Start Date *	10/11/2022
Responsible Team *	CareDirectorTest
Responsible User	Scott Simpson
Due Date	20/12/2022
Review Date	

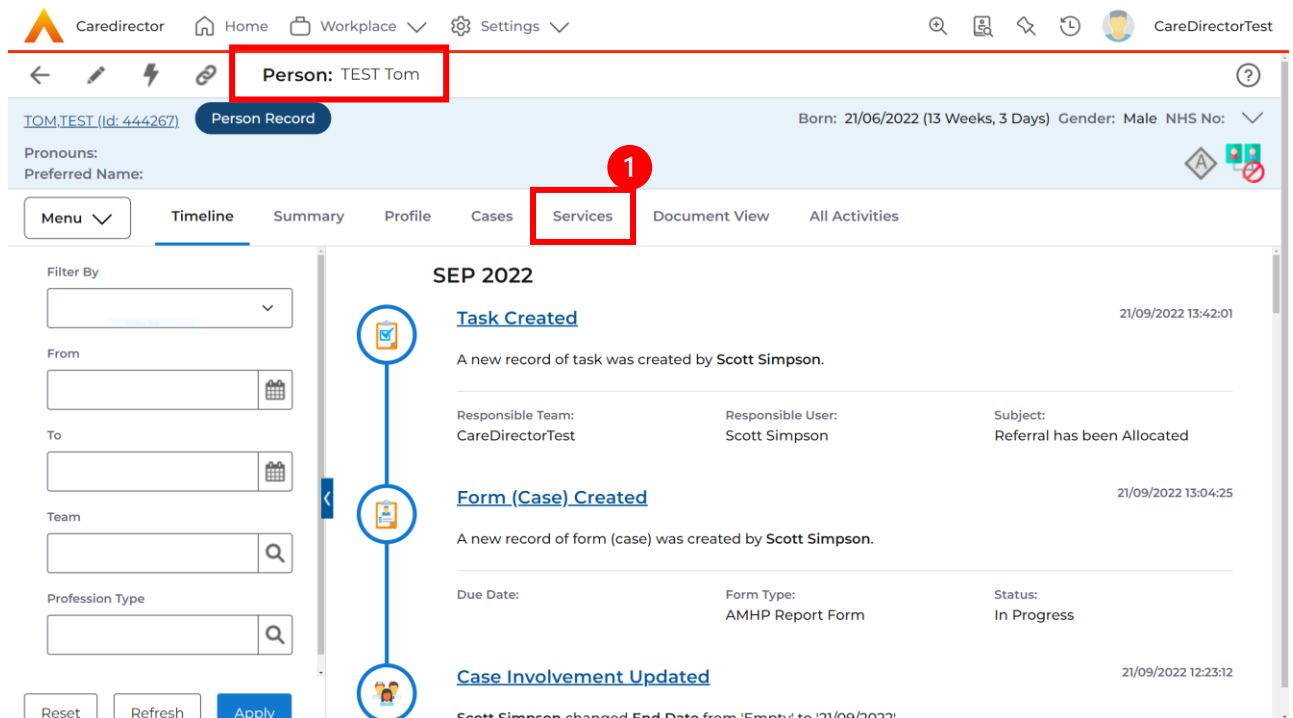
2. Select the **Three Dots** and select **Activate**.

The screenshot shows the same CareDirector interface as above, but with the 'Three Dots' menu open. The menu options are: Share, Assign, Clone, Restrict Access, Activate, Delete, Run Workflow, and Copy Record Link. The 'Activate' option is highlighted with a red box. The form details are the same as in the previous screenshot.

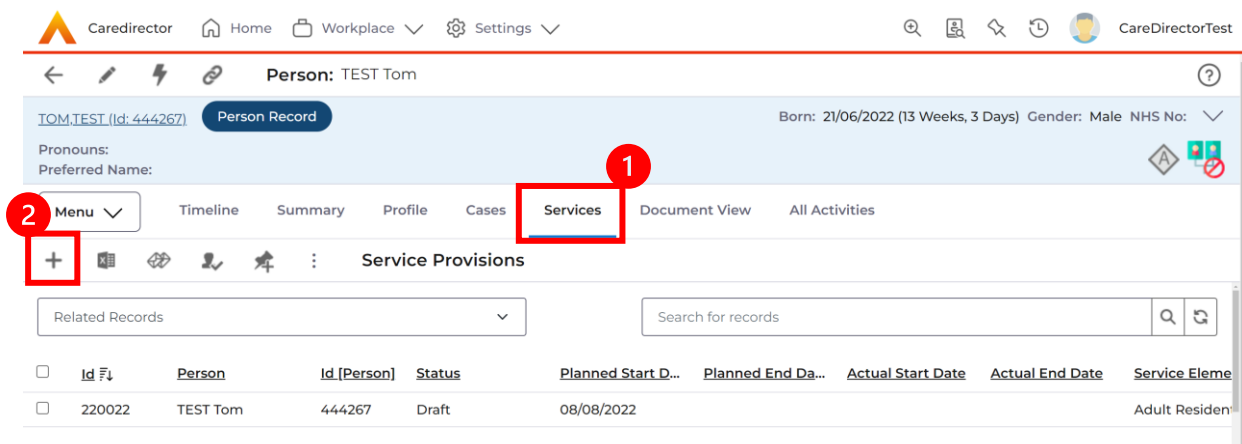
# How to input Service Provisions

## Where to find Service Provisions

1. Every **Service Provision** in the **Service Provision** booklet will require these steps beforehand.
2. Select the relevant **Person Record** and select **Services**.



3. After selecting **Services**, if the **Service Provision** is not linked to an existing one, create a new one by selecting the **Create New Record** from the toolbar.



4. Then follow the appropriate section to complete the **Service Provision**.

## How to Authorise a Service Provision

1. Locate the **Service Provision** and make sure the **Status** is **Ready for Authorisation**. If it is not, then go into the record and change the **Status** to **Ready for Authorisation** then select **Save**.

The screenshot shows the 'Service Provision Statuses' dialog box in the CareDirector system. The dialog has a search bar and a table of statuses. The 'Ready for Authorisation' status is selected. The 'OK' button is highlighted with a red box and a callout '3'. In the background, the 'Status' dropdown is highlighted with a red box and callout '1', and the 'Save' button is highlighted with a red box and callout '4'. The 'Ready for Authorisation' status is highlighted with a red box and callout '2'.

2. If inside the record, you need to come out to ensure you are seeing the grid view. From the grid view in **Person Record** or **Dashboards**. **Checkbox** the correct **Service Provision** and select the **Three Dots** from the toolbar. Then select **Authorise**.

The screenshot shows the 'Service Provisions' grid view in the CareDirector system. The 'Services' tab is active. The first row of the grid is selected with a checkbox. The 'Authorise' option is selected from the context menu. Red callouts indicate: 1. Services tab, 2. Selected row, 3. Three dots menu, and 4. Authorise option.

Id	Person	Planned Start Date	Planned End Date	Actual Start Date	Actual End Date	Service Element 1
220015	TEST Tom	24/06/2022				Adult Residential Care
<input checked="" type="checkbox"/>	220012	TEST Tom	request 24/06/2022			SDS - WMDC Managed Account

## How to input Service Deliveries

1. You will now need to record **Service Deliveries**. Select **Service Deliveries** from the tabs and select **Create New Record** from the toolbar.

The screenshot shows the CareDirector web application interface. At the top, there is a navigation bar with 'Caredirector', 'Home', 'Workplace', and 'Settings'. Below this is a breadcrumb trail: 'Service Provision: Tom MullenTest \ A J Social \ SDS - Managed Account \ Home Care \ Spot \ 220110 \ 08 Nov 2022'. The main header area displays the user's name 'MULLENTEST, Tom (Id: 444264)', a 'Person Record' button, and personal details: 'Born: 03/05/1955 (67 Years) Gender: Male NHS No:'. Below the header, there are several tabs: 'Me', 'Timeline', 'Details', 'Service Deliveries', 'Service Delivery Variations', 'Costs Per Week', and 'Finance Transactions'. The 'Service Deliveries' tab is highlighted with a red box and a red circle containing the number '1'. Below the tabs is a toolbar with a '+' icon (highlighted with a red box and a red circle containing the number '2'), a trash icon, and a refresh icon. Below the toolbar is a search bar labeled 'Search for records'. At the bottom, there is a table header with columns: 'Person', 'Id', 'Planned Start Ti...', 'Units', 'Total Units', 'Total Visits', 'Monday', 'Tuesday', and 'Wedr'. The table content is empty, displaying 'NO RECORDS' and the message 'No results were found for this screen.'

2. Now select the information required. **Units** is based around **1** being a **1 of the Rate Unit**. For example, if your **Rate Unit** shows **Per 1 Hour Unit** then you put **Units** as **1** this will record that each visit will be **1 hour long**. If it says **0.5** it will be **half an hour each visit**.
3. **Planned Start Time** is the time that the visit takes place on the chosen dates. If more than one visit is required and at different times, then when **Saved** create a new **Service Delivery**.
4. Once **Saved**, this will automatically generate **Total Visits/ Total Units**.



Caredirector Home Workplace Settings CD V6 Team

Service Delivery: TEST Tom \ Reablement Team \ Re-ablement \ Outreach \ \ \ Spot \ 220088 \ 12 Oct 2...

TOM.TEST (Id: 444267) Person Record Born: 21/06/2022 (20 Weeks, 3 Days) Gender: Male NHS No:   
 Pronouns: Preferred Name:

Menu Details Variations

### General

Service Provision * TEST Tom \ Reablement Team \ Re-ablement \ Outreach \ \ \ Spot \ 22008...	Responsible Team * CareDirectorTest
Id * 188114	Rate Unit * Per 1 Hour \ Hours (Whole) \ Hours (Part)
Planned Start Time * 09:00	Units * 1.0000
Total Visits * 7	Total Units * 7.0000
Number of Carers * 1	

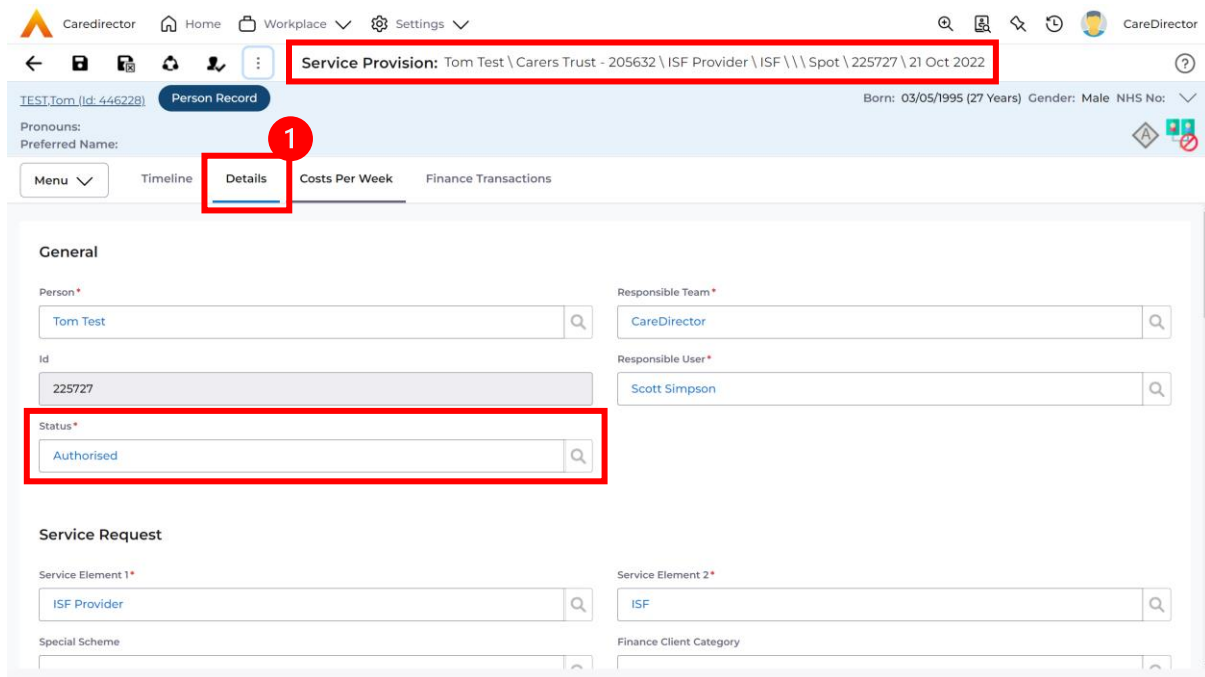
### Schedule applies to days

Select All * <input checked="" type="radio"/> Yes <input type="radio"/> No	Thursday * <input checked="" type="radio"/> Yes <input type="radio"/> No
Monday * <input checked="" type="radio"/> Yes <input type="radio"/> No	Friday * <input checked="" type="radio"/> Yes <input type="radio"/> No
Tuesday * <input checked="" type="radio"/> Yes <input type="radio"/> No	Saturday * <input checked="" type="radio"/> Yes <input type="radio"/> No
Wednesday * <input checked="" type="radio"/> Yes <input type="radio"/> No	Sunday * <input checked="" type="radio"/> Yes <input type="radio"/> No

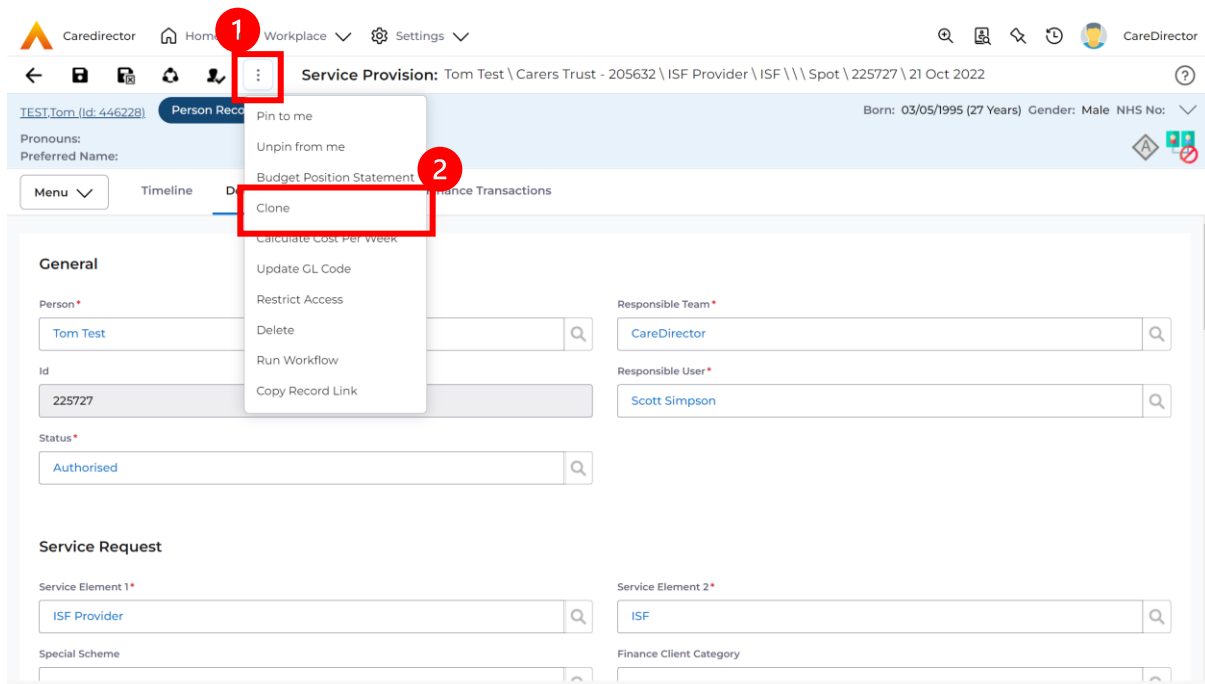
5. If the **Service User** requires multiple different visits at separate times. Ensure another **Service Delivery** has been inputted.

## How to Clone a Service Provision

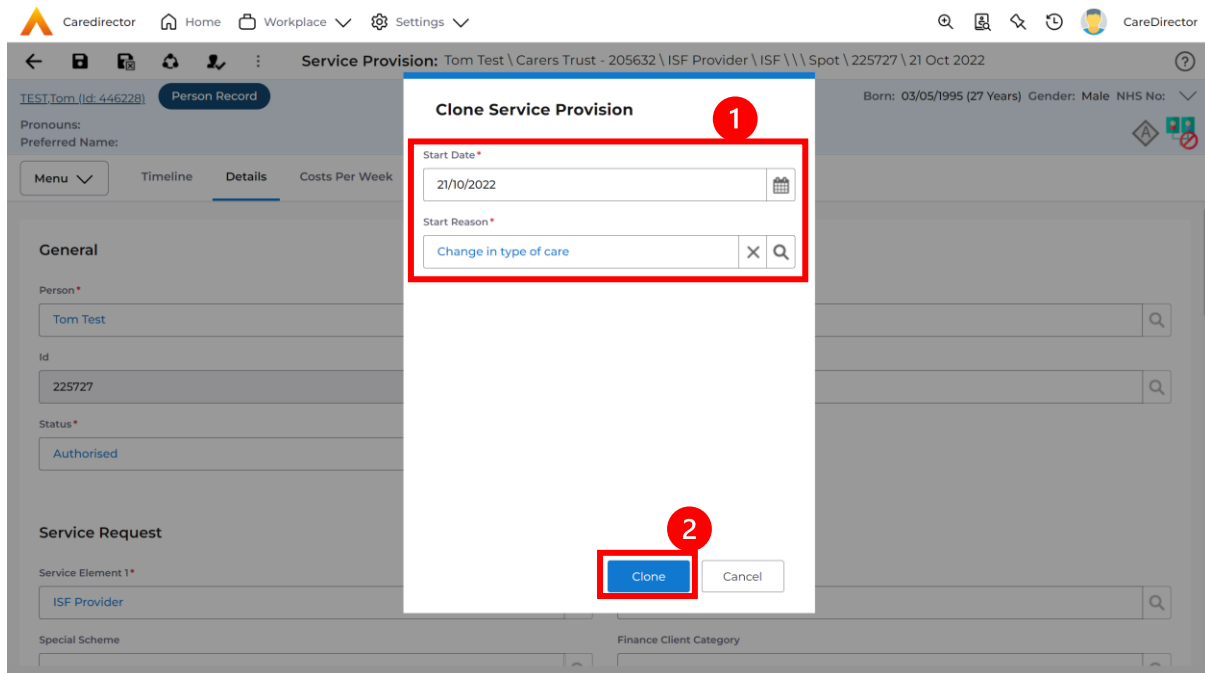
1. Locate the **Service Provision** and ensure that the **Status** is **Authorised**.



2. Select the **Three Dots** from the toolbar and select **Clone**.



3. Select the new **Start Date** and **Start Reason** and select **OK**.



## How to End Service Provisions

1. Locate the **Service Provision** that requires an end date. Select the **Details** tab, scroll down to the **Dates** heading and enter an **Actual End Date** and **End Reason**. When finished, select **Save**.

The screenshot shows the CareDirector interface for a service provision. The 'Details' tab is selected, and the 'Dates' section is highlighted with a red box. The 'Actual End Date' and 'End Reason' fields are also highlighted with a red box. A red circle with the number '1' is next to the 'Actual End Date' field, and a red circle with the number '2' is next to the 'Details' tab.

Service Provision: TEST Tom \ Co-ordination Team \ SDS - WMDC Managed Account \ Home Care \ \ Spot \ 220012 \ 24 Ju...

Person Record

Born: 24/07/1950 (72 Years) Gender: Male NHS No: ...

Menu | Timeline | **Details** | Service Deliveries | Service Delivery Variations | Costs Per Week | Finance Transactions

**Dates**

Planned Start Date: 24/06/2022

Planned End Date: [Empty]

Actual Start Date: [Empty]

Actual End Date: 21/10/2022

Start Reason\*: New Placement

End Reason\*: Carer's Decision

**Commissioning**

Purchasing Team: Adults Connecting Care Team East

Frequency in Weeks\*: 1

## How to close a Case

### Ending Secondary Involvements

1. Before a Case can be closed, any ongoing work associated with the **Case** must be ended.
2. Only the secondary and external **Involvements** need to have an end date. The **Responsible User/ Team** will automatically end once the **Case** has been **closed**.
3. From the **Menu** dropdown list on a **Case Record**, select **Related Items** and then **Involvements**.

The screenshot displays the CareDirector web application interface. At the top, the navigation bar includes 'Caredirector', 'Home', 'Workplace', and 'Settings'. The main header shows the case title 'Case: Tom, TEST - (21/06/2022) [CAS-000001-0087]' and the user 'CareDirectorTest'. Below the header, the 'Person Record' section for 'TOM,TEST (Id: 444267)' is visible, including birth date, gender, and NHS number. A left-hand menu is open, with 'Menu' selected. The 'Related Items' section is highlighted, and the 'Involvements' option is selected. Red boxes and numbers 1, 2, and 3 indicate the steps: 1. Clicking the 'Menu' button, 2. Clicking 'Related Items', and 3. Clicking 'Involvements'.

4. Open the relevant entry by double clicking an open space. This will open the involvement.

Caredirector Home Workplace Settings CareDirectorTest

← Case: Tom, TEST - (21/06/2022) [CAS-000001-0087] ?

TOM,TEST (Id: 444267) **Person Record** Born: 21/06/2022 (13 Weeks, 1 Day) Gender: Male NHS No: ▾

Pronouns: Preferred Name:

Menu ▾ Timeline Details

+ Case Involvements

Related Records ▾ Search for records

<input type="checkbox"/>	<u>Involvement Member</u> ⌵	<u>Role</u>	<u>Involvement Re...</u>	<u>Case</u>	<u>Responsible Team</u>	<u>Start Date</u> ⌵	<u>End Date</u>	<u>Create</u>
<input type="checkbox"/>	Community Occupatio...	Occupational Th...		Tom, TEST - (21/06/2022) [CAS-000001-0087]	CareDirectorTest	21/09/2022		Scott

5. Enter today's date in the **End Date** field. Then select **Save and Return to Previous Page** and repeat the process until all **Secondary and External Involvements** are ended.

The screenshot shows the CareDirector interface for a Case Involvement. The top navigation bar includes the CareDirector logo, Home, Workplace, and Settings menus, along with search, user profile, and help icons. The breadcrumb trail indicates the current page is 'Case Involvement: Case Involvement within Case Tom, TEST - (21/06/2022) [CAS-000001-0087] created by Scott Simpson o...'. The 'Details' tab is selected, and the 'General' section is expanded. The form contains the following fields:

- Case \***: Tom, TEST - (21/06/2022) [CAS-000001-0087]
- Responsible Team \***: CareDirectorTest
- Person \***: TEST Tom
- Involvement Member \***: Community Occupational Therapy Service
- Role \***: Occupational Therapist
- Start Date \***: 21/09/2022
- Involvement Reason**: (empty)
- End Date**: 21/09/2022 (highlighted with a red box and a red circle containing the number 1)
- Involvement End Reason**: (empty)
- Involvement Review Date**: (empty)
- Description**: (empty)

The 'Save and Return to Previous Page' button in the top navigation bar is highlighted with a red box and a red circle containing the number 2.

6. If the Case cannot be closed, there will be ongoing work associated with the Case.

## Close an Open Activity

1. Select **Menu** within the **Case Record**. Then select **Activities** and open the relevant location of an activity.

The screenshot displays the CareDirector interface for a case record. At the top, the navigation bar includes 'Caredirector', 'Home', 'Workplace', and 'Settings'. The case title is 'Case: Tom, TEST - (21/06/2022) [CAS-000001-0087]'. Below the case title, the 'Person Record' tab is active, showing 'TOM,TEST (Id: 444267)' and 'Born: 21/06/2022 (13 Weeks, 1 Day) Gender: Male NHS No:'. The 'Menu' button is highlighted with a red box and labeled '1'. The 'Activities' option in the dropdown menu is highlighted with a red box and labeled '2'. The 'Activities' section is further highlighted with a red box and labeled '3', showing options for 'Appointments', 'Case Notes', 'Emails', 'Letters', 'Phone Calls', and 'Tasks'. Below the menu, there are search bars and form fields for 'Responsible User', 'Responsible Team\*' (with 'AMHP Coordinator' selected), 'Review Date', 'Closure Accepted By\*', and 'Archive Date\*'.





2. Open the relevant location of an activity has been opened. Select the **Activity** that needs to be closed from the options.




Caredirector Home Workplace Settings CareDirectorTest



← Case: Tom, TEST - (21/06/2022) [CAS-000001-0087] ?

TOM,TEST (Id: 444267) **Person Record** Born: 21/06/2022 (13 Weeks, 1 Day) Gender: Male NHS No: ▾

Pronouns: Preferred Name:  

Menu ▾ Timeline Details

+    **Tasks**

Related Records ▾ Search for records  

<input type="checkbox"/>	<u>Subject</u>	<u>Due</u> ⌵	<u>Status</u>	<u>Regarding</u>	<u>Reason</u>	<u>Responsible Team</u>	<u>Responsible User</u>
<input type="checkbox"/>	Referral has been Allocated	21/09/2022 15:25:00	Open	Tom, TEST - (21/06/2022)...		CareDirectorTest	Scott Simpson

3. Located on the toolbar, select **Mark as Complete**. If it is within the three dots, select **Complete**. Then select **Save and Return to Previous Page**.

The screenshot displays the CareDirector web application interface. At the top, the navigation bar includes 'Caredirector', 'Home', 'Workplace', and 'Settings'. The main header shows a task titled 'Task: Referral has been Allocated' with a user profile icon for 'CareDirectorTest'. Below the header, a record for 'TOM,TEST (Id: 44426)' is shown, including fields for 'Pronouns', 'Preferred Name', 'Born: 21/06/2022 (13 Weeks, 1 Day)', and 'Gender: Male'. A context menu is open over the record, listing options: 'Clone', 'Complete', 'Cancel', 'Restrict Access', 'Delete', 'Run Workflow', and 'Copy Record Link'. The 'Complete' option is highlighted. Below the record, the 'General' section contains a 'Subject' field with the text 'Referral has been Allocated' and a 'Description' field with a rich text editor toolbar. The toolbar includes options for Bold, Italic, Underline, Strikethrough, Text Color, Background Color, Bulleted List, Numbered List, Indent, Outdent, Quote, Unquote, Link, Unlink, Table, Table of Contents, Undo, Redo, Search, and Source. The character count at the bottom right of the description field is 'Characters (with HTML): 0/100000'.

## Closing a Case

1. After all work has been completed, select the **Details** tab on the **Case Record**. Then scroll to **Assignment Information**.

The screenshot displays the CareDirector web application interface. At the top, there is a navigation bar with 'Caredirector', 'Home', 'Workplace', and 'Settings' menus. A search bar on the right shows the user 'CareDirectorTest'. Below the navigation bar, a breadcrumb trail indicates the current location: 'Case: Tom, TEST - (21/06/2022) [CAS-000001-0087]'. The main content area features a 'Person Record' button and a 'Details' tab, which is highlighted with a red box and a circled '1'. Below the tabs, the 'Assignment Information' section is visible, containing several input fields. The 'Case Status\*' field is highlighted with a red box and a circled '2', and it contains the text 'Assign To Team'. Other fields include 'Case Priority', 'Responsible User', 'Responsible Team\*' (containing 'AMHP Coordinator'), and 'Review Date'.

## 2. Select the **Lookup** function next to the **Case Status** field.

Caredirector Home Workplace Settings

Case: Tom, TEST - (21/06/2022) [CAS-000001-0087]

TOM,TEST (Id: 444267) **Person Record** Born: 21/06/2022 (13 Weeks, 1 Day) Gender: Male NHS No:

Menu Timeline **Details**

### Assignment Information

Case Status \*  **2**

Case Priority

Responsible User

Responsible Team \*

Review Date

3. This will open a new window, to select a relevant option. Then select **OK**.

The screenshot shows the CareDirector web application interface. At the top, there is a navigation bar with 'Caredirector', 'Home', 'Workplace', and 'Settings'. The main content area displays a 'Person Record' for 'TOM, TEST (Id: 444267)'. A modal window titled 'Case Statuses' is open, allowing the user to search for and select a case status. The modal includes a search bar and a list of status options. The 'Closed & Logged As Enquiry' option is selected. The 'OK' button at the bottom of the modal is highlighted with a red box.

**Case Statuses** Enter your search criteria.

Look in: Social Care Case Status Lookup View

Search: Search for records

	Name	Code	Gov C
<input type="checkbox"/>	Awaiting allocation (unscheduled revi...		
<input type="checkbox"/>	Closed		
<input checked="" type="checkbox"/>	Closed & Logged As Enquiry		
<input type="checkbox"/>	Closed as a Contact		
<input type="checkbox"/>	Closed Under Review		
<input type="checkbox"/>	Closure Request Rejected		
<input type="checkbox"/>	Closure Requested		
<input type="checkbox"/>	Enquiry led by other		

Page 1 | 1 - 13

**OK** Close

- This will then show new fields on the right-hand side next to **Case Status**. Enter a **Closure Reason**, **Closure Accepted By** and **Archive Date**.

The screenshot displays the CareDirector interface for a case record. The top navigation bar includes 'Caredirector', 'Home', 'Workplace', and 'Settings'. The case title is 'Case: Tom, TEST - (21/06/2022) [CAS-000001-0087]'. The user profile shows 'Born: 21/06/2022 (14 Weeks, 6 Days) Gender: Male NHS No:'. The 'Assignment Information' section is highlighted with a red box and contains the following fields:

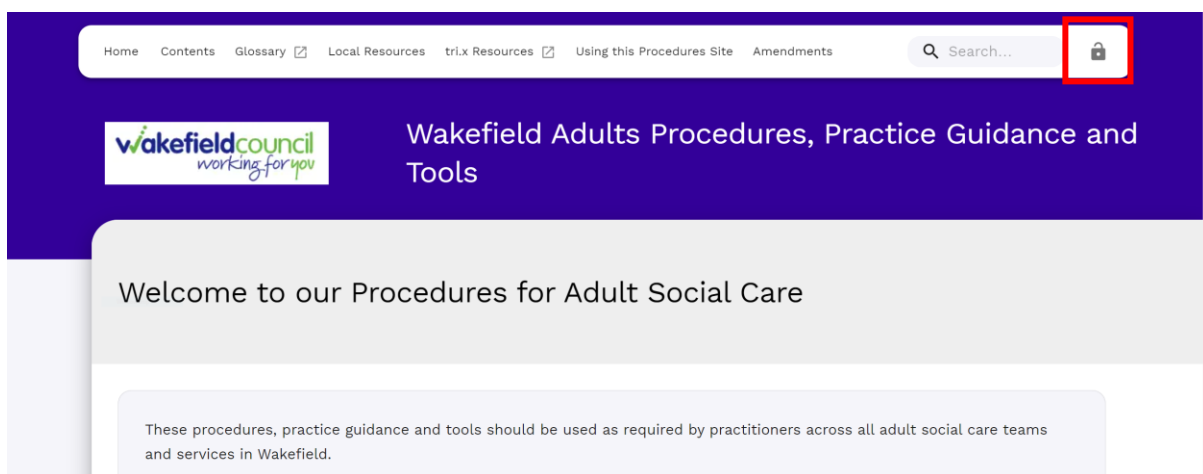
- Case Status\***: Closed
- Case Priority**: (Empty)
- Responsible User**: (Empty)
- Responsible Team\***: AMHP Coordinator
- Review Date**: (Empty)
- Last Assigned to Team Date**: 20/09/2022
- Close Date\***: 03/10/2022 13:43
- Closure Reason\***: All Work Completed
- Closure Accepted By\***: Scott Simpson
- Archive Date\***: 28/10/2022

The 'Other Information' section at the bottom includes 'Re-Referral' and 'Non-Migrated Worker Name'.

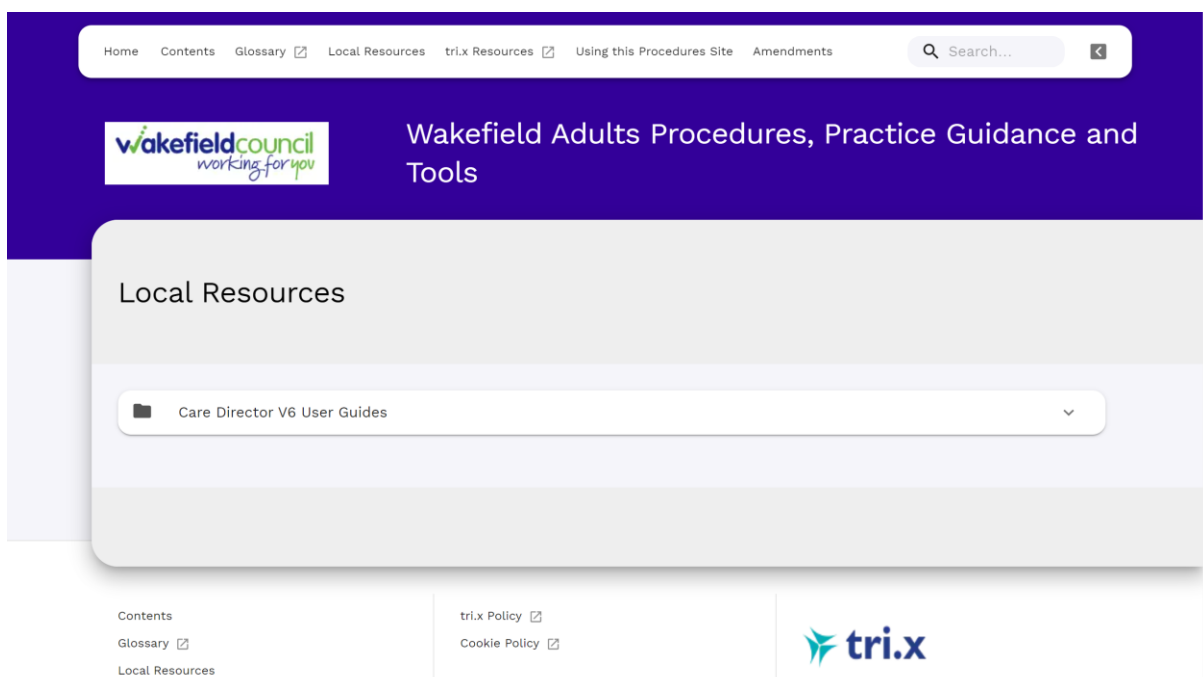
- When finished, select **Save** and an activity will be automatically generated for the Administration Team to pick up and input any details required in the **Person Risk** section of **CareDirector**.

## Further CareDirector Guidance

1. This is your **Bespoke Guide** available for you and your team. However, further guides are available for you.
2. Go to **Microsoft Edge** and copy and paste this URL:
  - a. <https://wakefieldadults.proceduresonline.antser.com/>
3. Select the **Padlock** to login to your **Portal**.



4. After a successful login, select **Local Resources** tab to see what further guides are available.



**Version Control**

Version Number	Change	Author	By Date
V1	INITIAL START	SCOTT SIMPSON	06/10/2022